

Musante, John

From: Musante, John
Sent: Friday, May 29, 2009 11:13 AM
To: Select Board
Cc: Geryk, Maria; Detweiler, Robert; Isman, Bonnie; Andrew Steinberg (steinberg_a@msn.com); Bob Saul; Brian Morton (bmorton115@comcast.net); Doug Slaughter (dwsloffer@aol.com); Kay Moran (kmoran@crocker.com); Marilyn Blaustein (blaustein@oirp.umass.edu); Marylou Theilman
Subject: Budget Update - June 1 Select Board Meeting
Attachments: FC Handout Budget Summary 5.28.09.pdf

The Finance Committee voted recommendations on the entire operating and capital budget at their meeting last evening. Enclosed is a summary handout that describes the overall budget balancing strategy to deal with the draconian reductions in state aid proposed by both the House and Senate. Attached to that summary are the recommended budget amounts from the Finance Committee. The list of handouts included in your meeting packet later today will include:

1. FY 10 Budget Solutions Summary (attached)
2. Article 14, Parts D & E – FY 09 Budget Amendments recommendations
3. Memo from MA Dept of Elementary and Secondary Education dated 5.7.09 re: Chapter 70 Budget Reductions for FY 09
4. MMA Update 5.22.09: "Senate Budget Slashes Municipal Aid by \$449M, School Aid by \$79M and updated FY 10 state aid "cherry sheets" comparing the Governor, House, and Senate proposals
5. MMA Update 5.27.09: "House, Senate to Resolve Budget Differences"
6. Information from Acting Superintendent Maria Geryk
 - a. Memo from Acting Superintendent Geryk 5.26.09 re: Request for Application of Reserve Funds for FY 10
 - b. Community Presentation on the Proposal to Close Mark's Meadow 4.23.09
 - c. Frequently Asked Questions re: Proposal to Close Marks Meadow Elementary School
7. Town of Amherst – FY 10 Municipal Budget Cuts 5.28.09
8. FY 10 Budget Proposal for Library Services 5.28.09. I inserted the dollar amounts recommended by the Finance Committee at their 5.28.09 meeting.
9. FY 10 Budget – Debt Service: revised recommendation per JCPC revisions.
10. JCPC Recommended Reductions to FY 10 Capital Plan if Funding Reduced Below 7.25% of Levy 4.30.09 (updated 5.28.09). The Finance Committee voted to recommend an additional \$135,000 in reductions to the capital plan using the JCPC's prioritized list of reductions.

TOWN OF AMHERST

FY 10 BUDGET SOLUTIONS (revised)

DRAFT – FOR DISCUSSION ONLY

REVIEWED WITH FINANCE COMMITTEE 5/28/09

- Budget Shortfall for Level Services (\$6,908,219)
- Solutions
 - Revenue = 35% of solution
 - Assumes state aid cuts in Senate version of state budget
 - Municipal revenue in Manager's Budget \$ 413,618
 - Ambulance, LSSE, Inspections
 - Library Revenue (Trustees 5/27/09)
 - Increased Gifts & Donations (to \$99k) \$ 18,450
 - Wildwood Roof MSBA Grant \$ 49,990
 - Local Option Taxes (Meals/Lodging) \$ 550,000
 - Assume only available for 50% of FY 10
 - Telecom Taxes \$ 250,000
 - Reserves \$ 1,200,000
 - Per Finance Committee Guidelines
 - \$700,000 Marks Meadow School Closure FY 11
 - \$500,000 for annualized amount of local option taxes available FY 11
 - Budget Cuts = 65% of solution
 - Operating and Capital Budgets (\$ 4,480,127)
 - Town -1.4%
 - Elementary -1.5%
 - Region (budget) -1.2% (Amherst Assessment +1.4%)
 - Library (budget) -1.6% (Town Tax Support -1.5%)
 - Capital -8.9%

TOWN OF AMHERST, MASSACHUSETTS
FY 09 and FY 10 State Aid Cuts (projected)
DRAFT For Discussion Purposes Only
28-May-2009

	FY 09 Budget	FY 09 Mid-Year Reductions	FY 10 Level Services	FY 10 House Final	FY 10 Senate Final	FY 10 FC 5/28/09	FY 10 FC v Senate
			% Chg	% Chg	% Chg	% Chg	% Chg
REVENUES:							
Taxes	37,239,884		3.1%	3.1%	3.1%	3.1%	3.1%
Other Local Revenues	5,311,090		2.0%	6.7%	6.7%	5,667,956	6.7%
State Revenues	17,129,832	(978,298)	-21.5%	-9.8%	-21.5%	13,454,915	-21.5%
Other Financing Sources	2,521,580		-1.2%	7.1%	7.1%	2,701,367	7.1%
Reserves (Free Cash + Stabilization)	425,000		-100.0%	-100.0%	0	0	-100.0%
Total Revenues	62,627,386	(978,298)	-4.8%	-0.6%	-0.6%	60,233,656	-3.8%
EXPENDITURES:							
Capital Plan - Debt Exclusion	441,321		-9.2%	-9.2%	-9.2%	400,837	-9.2%
Capital Plan - Tax Funded	2,547,858		3.7%	-3.6%	-3.6%	2,455,981	-3.6%
Other Govt Assessments	5,246,418		6.4%	8.8%	8.8%	5,582,969	6.4%
Miscellaneous	587,274		-7.2%	-5.1%	-5.1%	545,098	-7.2%
Subtotal Other Expenditures	8,822,871	0	4.0%	3.4%	3.4%	8,984,885	0.3%
Town	18,591,563		5.7%	-0.5%	-0.5%	18,498,218	-0.5%
Elementary Schools	20,689,430		5.2%	-0.4%	-0.4%	20,381,768	-1.5%
Amherst Pelham RSD Assessment	12,395,375		12.0%	3.5%	3.5%	12,829,213	3.5%
Amherst Pelham RSD Budget	28,120,995		6.0%	1.8%	1.8%	28,636,214	1.8%
Jones Library	2,128,147		4.2%	-1.7%	-1.7%	2,092,288	-1.7%
Jones Library (Tax Support)	1,490,365		9.3%	0.8%	0.8%	1,502,733	0.8%
Subtotal Operating Budgets	53,804,515	0	6.9%	0.4%	0.4%	54,034,085	0.4%
Total Expenditures	62,627,386	0	6.5%	0.8%	0.8%	63,018,970	0.6%
SURPLUS / (SHORTFALL):	(0)	(978,298)	(6,908,219)	(918,081)	(2,785,314)	(2,000,483)	784,830

TOWN OF AMHERST, MASSACHUSETTS
FY 09 and FY 10 State Aid Cuts (projected)
DRAFT For Discussion Purposes Only
28-May-2009

	FY 09 Budget	FY 09 Mid-Year Reductions	FY 10 Level Services	FY 10 House Final	FY 10 Senate Final	FY 10 5/28/09 FC	FY 10 FC v Senate
			% Chg	% Chg	% Chg	% Chg	
Estimated Structural Budget Gap	(425,000)	(978,298)	(6,483,219)	(6,483,219)	(6,483,219)	(6,483,219)	
Structural Deficit Remaining from Prior Year	0	0	(425,000)	(425,000)	(425,000)	(425,000)	
Current Year Budget Gap	(425,000)	(978,298)	(6,908,219)	(6,908,219)	(6,908,219)	(6,908,219)	
Operating Budgets							
Town							
Elementary Schools		(223,317)		(1,150,000)	(1,150,000)	(1,313,358)	(163,358)
Amherst Petham RSD Assessment		(221,749)		(1,146,825)	(1,146,825)	(1,379,423)	(232,598)
Jones Library Tax Support		(17,059)		(1,049,744)	(1,049,744)	(1,304,914)	(255,170)
Subtotal Operating Budgets	0	(462,125)		(3,472,680)	(3,472,680)	(4,158,510)	(685,830)
Capital Budget - Tax Funded				(186,617)	(186,617)	(321,617)	(135,000)
TOTAL EXPENDITURE REDUCTIONS	0	(462,125)		(3,659,297)	(3,659,297)	(4,480,127)	(820,830)
REVENUES:							
State							
Cherry Sheet Receipts				2,163,383			
Cherry Sheet Assessments				(137,473)			
ARRA \$50/per pupil					450,000	450,000	
Meals Tax +2% (Local Option)					100,000	100,000	
Hotel/Motel Tax (+2% Local Option)					250,000	250,000	
Close Telecommunications Tax Loophole					800,000	800,000	
Subtotal State Revenues	0	0	0	2,025,910	800,000	800,000	
Federal (Economic Stimulus Legislation)							
Capital							
School Grants (Title 1, IDEA)							
Subtotal Federal Revenues	0	0	0	0	0	0	
Local							
State Grant - Wildwood Roof Project		362,198		49,990	49,990	49,990	
Overlay Surplus		153,975					
New / Increased Revenue - Town				413,618	413,618	413,618	
New / Increased Revenue - Schools							
New / Increased Revenue - Library							
Reserves	425,000						
Property Tax Override							
Subtotal Local Revenues	425,000	516,173	0	463,608	483,608	1,882,058	1,200,000
TOTAL REVENUE ADJUSTMENTS	425,000	516,173	0	2,489,518	1,263,608	2,482,058	
SURPLUS / (SHORTFALL) REMAINING	0	0	(6,908,219)	(759,405)	(1,985,314)	53,966	

FY 09 BUDGET/ACTUAL PROJECTED THRU JUNE 30, 2009

28-May-2009

	Projected Surplus (Shortfall)	
GENERAL GOVERNMENT	55,000	Insurance savings offset Legal, Special Election
PUBLIC SAFETY	(55,000)	Police Facility utilities, Police, dispatch OT
PUBLIC WORKS	(115,000)	Snow/Ice
CONS/PLANN/INSP	5,000	
COMMUNITY SERVICES	(25,000)	Vet's Benefits shortfall offset by vacancies
DEBT SERVICE	15,000	

NET SURPLUS/(DEFICIT)	<u>(120,000)</u>
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Available Reserve Fund	100,000
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✓ Recommended Transfer ATM Article 14, Part D

GENERAL GOVERNMENT	(50,000)
DEBT SERVICE	(15,000)
PUBLIC SAFETY	50,000
COMMUNITY SERVICES	15,000

✓ Part E - Recommend Dismissal

School Finance: Chapter 70 Program**MEMORANDUM**

To: Superintendents and Municipal Officials
From: Mitchell D. Chester, Ed.D., Commissioner
Date: May 7, 2009
Subject: Chapter 70 Budget Reductions for FY09

AMHERST : \$ 659,034

AMHERST-PELHAM : \$1,039,405

As you know, Governor Patrick and the administration have prioritized public education funding throughout this difficult budget year. In response to further declines in revenue through the month of April, the FY09 budget shortfall increased to nearly another \$1 billion. To address this deficit, today the Governor put forth legislation that will ensure every district continues to receive the expected amount of FY09 Chapter 70 aid through a combination of state and federal dollars. The Governor's plan commits \$412 million of federal stimulus funding to offset a \$412 million reduction in the remaining FY09 Chapter 70 appropriation.

To be clear, all districts will be held harmless under the Governor's proposal.

Municipalities and regional school districts will see their June 30 state aid payments significantly reduced under this plan, but will receive offsetting federal funds in the form of FY09 grants from the State Fiscal Stabilization Fund (SFSF) program. Of the \$412 million, \$322 million will come from the 81.8 percent portion of the SFSF funds which are earmarked for education, and the remaining \$90 million will come from the 18.2 percent portion of the SFSF funds available for general government purposes.

Next week we will post the following documents on the ESE ARRA webpage:

- A chart showing the amount of each district's Chapter 70 reduction under this plan, which also represents the amount of FY09 SFSF funds that the district will receive.
- A streamlined application form for districts to complete and submit in order to receive their FY09 SFSF grant. **To help us expedite the distribution of these funds, please return these applications by May 22.**
- A joint directive from the Department of Revenue and the Department of Elementary and Secondary Education regarding accounting and budget actions that must be taken at the municipal and district levels to implement these changes.

In addition to this \$412 million in new FY09 SFSF grants, the Governor is continuing to reserve \$168 million for the previously announced FY10 SFSF grants, to ensure that all districts receive foundation funding in FY10.

If you need additional information, please contact Associate Commissioner Jeff Wulfson at 781-338-6500 or jwulfson@doe.mass.edu.

Senate budget slashes municipal aid by \$449M, school aid by \$79M



May 22, 2009

The Senate late last night adopted a fiscal 2010 state budget that would cut municipal aid by 34 percent – to levels last seen in the 1980s – and cut Chapter 70 school aid by \$79 million, a reduction of roughly 2 percent for each district.

Municipal aid in the Senate plan is \$449 million below original fiscal 2009 levels, \$321 million below the adjusted (post-9C) fiscal 2009 levels, and \$229 million below the House-passed budget.

While the Senate, like the House, endorsed an increase in the state sales tax from 5 percent to 6.25 percent, senators did not dedicate any of the new revenue to municipal aid, as the House had done.

"The Senate budget includes extraordinarily deep and harmful local aid cuts that would cause immediate and lasting damage to cities and towns in every corner of Massachusetts," said MMA Executive Director Geoff Beckwith. "This budget would force communities to lay off thousands of key staff. Essential services would be severely weakened, and reliance on the regressive property tax would skyrocket."

Despite a flood of calls from local officials, senators voted to attach health insurance language, proposed by the Municipal Relief Commission, that would mandate collective bargaining for health insurance changes, institute an unworkable dollar benchmark, institute binding arbitration to "resolve" disputes, and penalize communities with a local aid takeaway.

The MMA argues that this language is much worse than no reform at all. The association will continue to fight for its proposal to simply give cities and towns the same authority the state has over health insurance plan design.

The Senate did, however, approve two key priorities of the MMA. The budget bill would allow communities, at their option, to assess a 2 percent tax on meals and increase local lodging taxes by 2 percent. The bill would also eliminate a local property tax loophole on telecommunications poles and wires, a provision worth \$26 million for cities and towns, though the Senate did not eliminate the loophole on equipment.

The full annualized revenues from the meals tax would be \$250 million, but it is estimated that cities and towns could raise approximately \$170 million in fiscal 2010 because of the delay in implementation. The lodging tax would raise an estimated \$20 million per percent on an annualized basis.

The Senate budget proposes that Massachusetts join the nationwide Powerball Lottery game, a

provision that senators used to add back \$35 million to municipal aid (adding 4.217 percent to the general unrestricted aid number in the original Senate Ways and Means budget for each community). The Senate used the Powerball plan to reduce the municipal aid cut from \$484 million to \$449 million.

The Senate budget would make the following cuts in major local aid programs:

- \$89 million from the special education circuit-breaker (leaving the program at 60 percent funding)
- \$35 million from the police career incentive program (Quinn Bill)
- \$31 million from regional school transportation reimbursements
- \$27.5 million from community policing and anti-gang funding
- \$20 million from sewer rate relief funding, eliminating the account
- \$8 million from library grants
- \$3 million from the payment-in-lieu-of-taxes (PILOT) program

Even after adopting the sales tax increase, which the MMA and local officials supported, the Senate budget is based on \$1.5 billion less in state tax revenues than the House or governor's budgets, due to the crumbling economy.

Similar to plans put forth by the governor and the House, the Senate plan would rely on federal stimulus funds to add to Chapter 70 to get approximately 170 districts up to foundation level. The overall foundation mark for each district is slightly lower in the Senate budget, however, due to a lower inflation calculation used to save the state money, so the overall combination of Chapter 70 and federal funds for these 170 districts is approximately 1 percent smaller than what is found in the House and governor's plans. The Senate did not endorse the House's suggested \$50 per student minimum aid in its federal stimulus allocations.

"This is a shared crisis," Beckwith said, "and cities and towns need basic levels of local aid and tools to protect their communities. This budget does not contain the local aid or municipal management tools that are required."

The budget now goes to a House-Senate conference committee to iron out the differences and develop the final budget that will be sent to the governor by the last week of June.

The Senate's updated local aid numbers should be available online by early next week. To view them, [click here](#).

**Massachusetts Department of Revenue
Division of Local Services
FY2010 Local Aid Estimates**

AMHERST

	FY2009 Cherry Sheet Estimate	FY2010 Governor's Budget (House 1)	FY2010 House Final Budget Proposal	FY2010 Senate Final Budget Proposal
Education:				
Chapter 70	6,266,707	6,266,707	6,266,707	6,141,373
School Transportation	0	0	0	0
Retired Teachers' Pensions	0	0	0	0
Charter Tuition Reimbursement	228,361	176,432	301,744	301,744
Offset Receipts:				
School Lunch	6,560	6,866	6,866	6,866
School Choice Receiving Tuition	0	0	0	0
Sub-Total, All Education Items	6,501,628	6,450,005	6,575,317	6,449,983

General Government:

Lottery Aid	8,513,025
General Fund Subsidy to Lottery	1,303,431
Additional Assistance	222,910

Unrestricted General Government Aid

	7,268,066	8,408,759	6,610,251
Revenues from Meals Tax Increase	0	0	0
Revenues from Rooms Tax Increase	0	0	0
Local Share of Racing Taxes	0	0	0
Regional Public Libraries	0	0	0
Police Career Incentive	193,159	141,373	83,369
Urban Renewal Projects	0	0	0
Veterans' Benefits	100,873	91,658	91,658
State Owned Land	173,456	181,091	162,988
Exemptions: Vets, Blind, Surviving Spouses & Elderly	35,774	39,754	39,754
Offset Receipts:			
Public Libraries	85,576	81,409	79,668
Sub-Total, All General Government	10,628,204	8,944,044	7,004,932

Total Estimated Receipts

17,129,832	15,394,049	15,459,622	13,454,915
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FY2010 Local Aid Assessments AMHERST

	FY2009 Cherry Sheet Estimate	FY2010 Governor's Budget (House 1)	FY2010 House Final Budget Proposal	FY2010 Senate Final Budget Proposal
County Assessments	0	0	0	0
State Assessments and Charges:				
Retired Employees Health Insurance	0	0	0	0
Retired Teachers Health Insurance	887,989	950,146	950,146	950,146
Mosquito Control Projects	0	0	0	0
Air Pollution Districts	6,864	7,265	7,265	7,265
Metropolitan Area Planning Council	0	0	0	0
Old Colony Planning Council	0	0	0	0
RMV Non-Renewal Surcharge	64,460	59,820	59,820	59,820
Sub-Total, State Assessments	959,313	1,017,231	1,017,231	1,017,231
Transportation Authorities:				
MBTA	0	0	0	0
Boston Metro. Transit District	0	0	0	0
Regional Transit	815,746	819,335	819,335	819,335
Sub-Total, Transportation Authorities	815,746	819,335	819,335	819,335
Annual Charges Against Receipts:				
Multi-Year Repayment Programs	0	0	0	0
Special Education	296	11,931	11,931	11,931
STRAP Repayments	0	0	0	0
Sub-Total, Annual Charges	296	11,931	11,931	11,931
Tuition Assessments				
School Choice Sending Tuition	210,542	227,286	227,286	227,286
Charter School Sending Tuition	306,958	344,679	469,980	469,980
Essex County Tech Sending Tuition	0	0	0	0
Sub-Total, Tuition Assessments	517,500	571,965	697,266	697,266
Total Estimated Charges	2,292,855	2,420,462	2,545,763	2,545,763

For information about how the estimates were determined and what may cause them to change, click: [Local Aid Estimate Program Summary](#).

Please note that final Charter School & School Choice assessments may change significantly when updated to reflect spring enrollment data and final tuition rates.

Massachusetts Department of Revenue
Division of Local Services
FY2010 Local Aid Estimates

AMHERST PELHAM

	FY2009 Cherry Sheet Estimate	FY2010 Governor's Budget (House 1)	FY2010 House Final Budget Proposal	FY2010 Senate Final Budget Proposal
Education:				
Chapter 70	9,883,632	9,883,632	9,883,632	9,685,959
Regional School Transportation	855,218	781,178	740,461	447,336
Charter Tuition Reimbursement	204,370	108,733	263,913	263,913
Offset Receipts:				
School Lunch	7,073	7,465	7,465	7,465
School Choice Receiving Tuition	574,683	488,016	488,016	488,016
Essex County Tech Receiving Tuition	0	0	0	0
Total Estimated Receipts	11,524,976	11,269,024	11,383,487	10,892,689
Estimated Charges:				
Special Education	27,771	18,816	18,816	18,816
School Choice Sending Tuition	95,864	61,971	61,971	61,971
Charter School Sending Tuition	716,565	703,302	850,544	850,544
Total Estimated Charges	840,200	784,089	931,331	931,331
Receipts Net of Charges	10,684,776	10,484,935	10,452,156	9,961,358

For additional information about how the estimates were determined and what may cause them to change in the future, please click on the following link: [Local Aid Estimate Program Summary](#).

Please note that final Charter School and School Choice assessments may change significantly when updated to reflect spring enrollment data and final tuition rates.

House, Senate to resolve budget differences



May 27, 2009

With the House and Senate approving state budget bills that differ significantly, including on many issues affecting local government, it appears unlikely that an agreement on a fiscal 2010 budget – and final municipal and school aid numbers – will be hammered out before July 1.

The House budget, approved on May 1, was based on a \$19.5 billion state tax forecast developed early in the year, supplemented by an increase in the sales tax rate from 5 percent to 6.25 percent, which the House projected would generate \$625 million for the state budget and \$275 million for state transportation agencies.

The Senate budget, finalized on May 21 after an unexpectedly steep drop in tax collections in April, was based on an updated tax forecast of \$18 billion, about \$1.5 billion less than the House. The Senate also voted to increase the sales tax to 6.25 percent – except for the sales tax on meals – and to expand the sales tax base to include alcoholic beverages.

In addition to increasing state tax collections, the Senate also drew from the recommendations of the Special Commission on Municipal Relief and voted to allow cities and towns to adopt a local sales tax on meals of 2 percent and to increase the municipal room occupancy excise rate from 4 percent to 6 percent. Similar provisions were also part of the Municipal Partnership Act legislation filed by Gov. Deval Patrick in January and the relief legislation filed for the MMA by Rep. Stephen Kulik of Worthington, also in January.

The Senate budget also included language that would eliminate the local property tax exemption for poles and wires owned by telecommunications companies. The House bill did not include this language.

Reaching agreement on expanding state and local taxes will be one of the main challenges for House and Senate budget negotiators.

Municipal and school aid

The House and Senate approved very different spending levels for the main municipal and school aid accounts, in part because of the reduction in the state revenue forecast.

The House approved \$1.094 billion for the new Unrestricted General Government Aid account, which represents the consolidation of Cherry Sheet Additional Assistance and Lottery accounts. About \$205 million of this amount was added to the House budget committee recommendation after House members voted to increase the sales tax rate.

The Senate approved \$865 million for the main municipal aid account. At this level, municipal aid would be cut by almost \$450 million, or 34 percent, below the original fiscal 2009 level of funding, reaching levels last seen in the early 1990s.

The House and Senate also took different approaches to Chapter 70 school aid. The House level-funded Chapter 70, but recommended that the governor use \$164 million in funds from the American Recovery and

Reinvestment Act to allow local spending up to the "foundation" budget level and to provide an increase for all districts of at least \$50 per student. The federal ARRA funds are not subject to appropriation by the Legislature, however, and the governor has full discretion over the use of these funds under federal rules.

The Senate reduced the Chapter 70 appropriation for all districts by 2 percent – \$79 million statewide – but recommended, like the House, that \$180 million in ARRA funds be used to boost local spending to the "foundation" level.

The Senate used a lower "foundation" growth factor than the House (3.04 percent rather than 4.5 percent) to reduce the "foundation" budget for each district.

Both the House and Senate adopted the governor's plan to recalculate and increase local contribution requirements to lock in past local spending above the minimum. This change would reduce or eliminate any increase in "foundation" aid for which the city or town would have otherwise qualified.

House and Senate negotiators will have to reach agreement on these very different approaches to the main municipal and school aid accounts.

Other local accounts

The House and Senate also approved different amounts for a number of important smaller accounts.

The House approved \$25 million for the state's 50 percent share of Police Incentive Pay Program salary adjustments and a phase-out of benefits for new police officers. The Senate voted \$10 million and proposed a special commission to study the program. Full funding of the state's share of this program would require an appropriation of more than \$50 million.

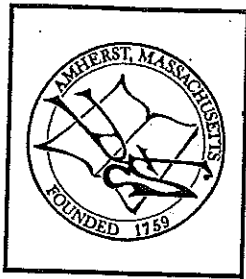
In two closely watched school aid accounts, the House approved \$51 million for reimbursements to regional school districts for student transportation and \$185 million for the special education "circuit breaker" program. The Senate approved \$31 million for transportation reimbursements and \$141 million for "circuit breaker" payments.

The Division of Local Services has posted on its Web site the Cherry Sheet estimates for each city and town based on the House and Senate budget bills.

In addition to tax law changes and appropriations, the Senate included in its budget health insurance language from the municipal relief commission report. This language would implement binding arbitration in health insurance decision-making and has been opposed by city and town officials across the state as a step backward in attempts to control growth in health insurance costs. [[See related story.](#)]

Last year, the Legislature sent the fiscal 2009 state budget bill to the governor on July 3, and he signed it on July 13.

Written by MMA Deputy Legislative Director John Robertson



THE PUBLIC SCHOOLS OF AMHERST, MASSACHUSETTS

OFFICE OF THE SUPERINTENDENT
170 CHESTNUT STREET
AMHERST, MA 01002

413-362-1810 (PHONE)
413-549-6108 (FAX)

May 26, 2009

To: Amherst Finance Committee
From: Maria Geryk, Superintendent of Schools
Re: Request for Application of Reserve Funds to FY10

Given the current fiscal crisis, the administrative team for the Amherst Public Schools has projected the anticipated revenue over the next three fiscal years. The bleak fiscal realities make it clear that dramatic restructuring must occur in order for us to maintain the essential programming and supports for our students.

The Amherst School Committee voted to support a budget of \$20,614,366 for FY10, which requires that \$1,146,825 be cut from our programs and services. In addition, based on recent financial news, it is anticipated that an additional \$232,598 will be cut. This brings district cuts into Tier 3 for FY10, totaling \$1,379,423. Cuts at this level will require substantial revisions to our current models of service delivery because we will have to deliver programming to students with roughly 26.5 fewer staff members.

Recognizing that this dramatic financial situation requires substantial model revision, the Amherst School Committee voted unanimously to close Mark's Meadow School at the end of the 2010-2011 school year, and to redistrict all students into the remaining three elementary schools. This level of reorganization must be implemented in a careful, thoughtful way in order to minimize the effect on students, which requires substantial planning time. In addition to closing Mark's Meadow, it is possible that the district will still need to cut an additional \$700,000 in FY11.

Moving from four to three schools will result in an initial savings of \$532,000 and a reduction in the base budget in subsequent years. These savings would be achieved as follows:

Reductions

○ Reduction in district classrooms from 67 (FY10) to 64 (FY11)	\$162,000
○ Reduction of principal and 2 secretaries	\$170,000
○ 2.5 custodians	\$55,000
○ 1.0 ELL teacher	\$54,000
○ 1.0 Special Education teacher	\$54,000
○ 1.0 Intervention teacher	\$54,000
○ 1.13 paraprofessionals	\$15,000
○ 1.0 LPN	\$35,000
○ 1.0 librarian	\$54,000
○ 1.0 IA paraprofessional	\$20,000
Total Reductions	\$673,000

Initial Costs

○ Annual transportation increase (an ongoing expense)	\$16,000
○ Moving and packing (a one-time expense)	\$70,000
○ Prep day for all teachers (a one-time expense)	\$55,000
Total Costs	\$141,000

Estimated Net Year 1 Savings: \$532,000

Further savings may be achieved after redistricting by the ability to more efficiently deliver services to Special Education students, English Language Learner students, and others. The estimate above is conservative—there may be an additional savings of \$100,000 - \$200,000. At this time, no determination has been made about the status of the two modular classrooms currently placed at Mark's Meadow School. Moving the modulars is estimated to cost \$140,000. We currently project that the district will be able to contain all classrooms within Crocker Farm, Fort River and Wildwood.

On behalf of the Amherst Public Schools, I am requesting that the Amherst Finance Committee apply \$700,000 dollars of reserves to the FY10 budget to allow this model revision to occur in a coordinated, thoughtful manner. Thank you in advance for your consideration of this request.

Community Presentation on the Proposal to Close Mark's Meadow

April 23, 2009

The State of Our Schools – Enrollment and Economics

We currently educate 1327 children (K to 6) in four elementary schools. The schools range in size from 194 (Mark's Meadow) to 462 (Fort River). The present enrollment reflects a decrease of approximately 300 students over the ten-year period since 1999. Fifteen years ago, there were approximately 1800 students in the elementary district. For FY10 and FY11, projections estimate elementary enrollment at between 1300 and 1310 students, possibly increasing by 50 students by FY14. Since we are facing serious, multi-year economic and funding issues, consideration has been given to closing an elementary school, and a motion was made at the March 17, 2009 Amherst School Committee meeting to close Mark's Meadow School no later than June 30, 2010. This motion is scheduled for a vote at the May 19, 2009 School Committee meeting, giving us one year to plan if the motion is approved. Under normal circumstances, which include level funding and stable enrollments, district leaders would not necessarily consider closing a school. Economic circumstances combined with declining district enrollment, have led to the current motion to close Mark's Meadow School.

Factors to Consider:

- Capacity - Our current buildings, including Mark's Meadow, have a capacity of 78 classrooms, 19 (not including preschool) at Crocker Farm, 24 at Fort River, 12 at Mark's Meadow (including the modulars), and 23 at Wildwood. Sixty-nine are presently in use as K-6 classroom space. Our current four-school configuration varies significantly in enrollment and number of classrooms.
- Equity - As shown in Figure 1 on Page 2 of this report, the schools vary considerably in terms of the percent of children enrolled in the free/reduced price lunch program. At Wildwood, 23% of the children receive free/reduced lunch, compared to 55% of those at Crocker Farm (and 29% at Fort River and 38% at Mark's Meadow). The number of students receiving free/reduced lunch at Crocker Farm increased by 9 percent for FY09 over FY08 and increased by 17% over the past five years. Over the same period of time – five years – the percentage of students at the other three schools participating in the free/reduced lunch program remained fairly stable, with fluctuations of -4% to +5%. When considering these statistics, it is important to note that the pre-school enrollment at Crocker Farm is not included; this is a district program which serves all eligible students in Amherst.
- Class Sizes - Given our current and anticipated student population, operating four K-6 schools causes class sizes to vary significantly both within and across schools (as shown in Figure 3). For example, in the current fifth grade, Crocker Farm has a class of 15, whereas Fort River has a class of 25. Similarly, in the fourth grade, Mark's Meadow has a class of 25, whereas Fort River has a class of 18.
- Operating Efficiency - As noted above, the current classroom configuration does not provide class-size flexibility, which means we use more classrooms and hire more teachers than we would need to if we could more efficiently distribute our students. With a three-school model, we could distribute the same number of students across 64 classrooms instead of 69 without going beyond current classroom class-size maximum targets. We would have fewer fifteen-student classes because we anticipate having enough students in each school to reduce this type of under enrollment. Because of the historical limit of 10 classrooms, coupled with its traditional kindergarten enrollment of 20 – 25 students, Mark's Meadow has not been able to accommodate all of the kindergarteners assigned to its geographic area in a single classroom, so "overflow" kindergarteners have been bused to other schools. In subsequent years, those students may return to Mark's Meadow or may choose to remain at the school to which they were originally assigned. In addition, our current organizational model requires four sets of support staff teams

(principal, secretary, nurse, librarian, custodian, etc.). The district has endeavored to hire full-time staff to support the population at Mark's Meadow, even though the building capacity and enrollment might not warrant such staffing. This has been done to attract and maintain staff over time and to foster a sense of community within the school. Presently, and for many years, Mark's Meadow utilized all 10 classrooms. Based on projections for FY10, just nine Mark's Meadow classrooms are needed for the existing and incoming student population.

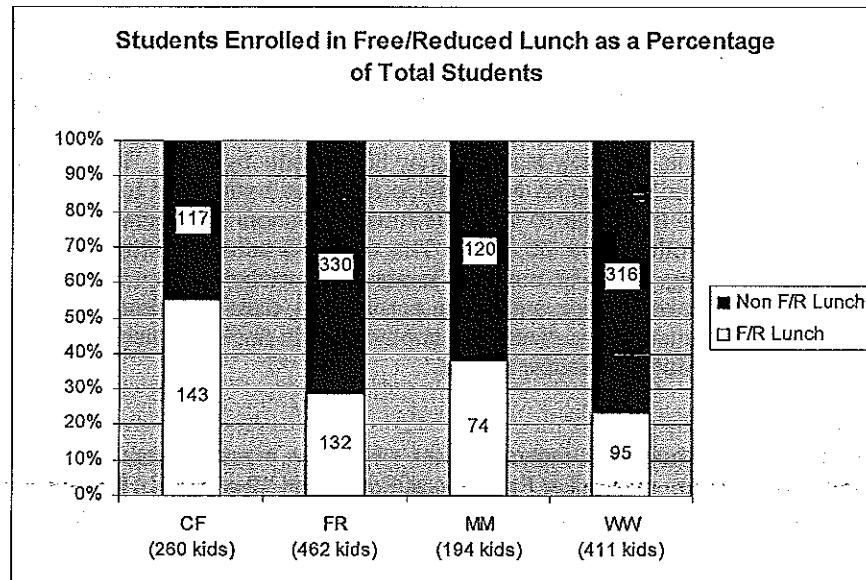


Figure 1. The percentage of students enrolled in Free/Reduced Lunch relative to the total students in each building.

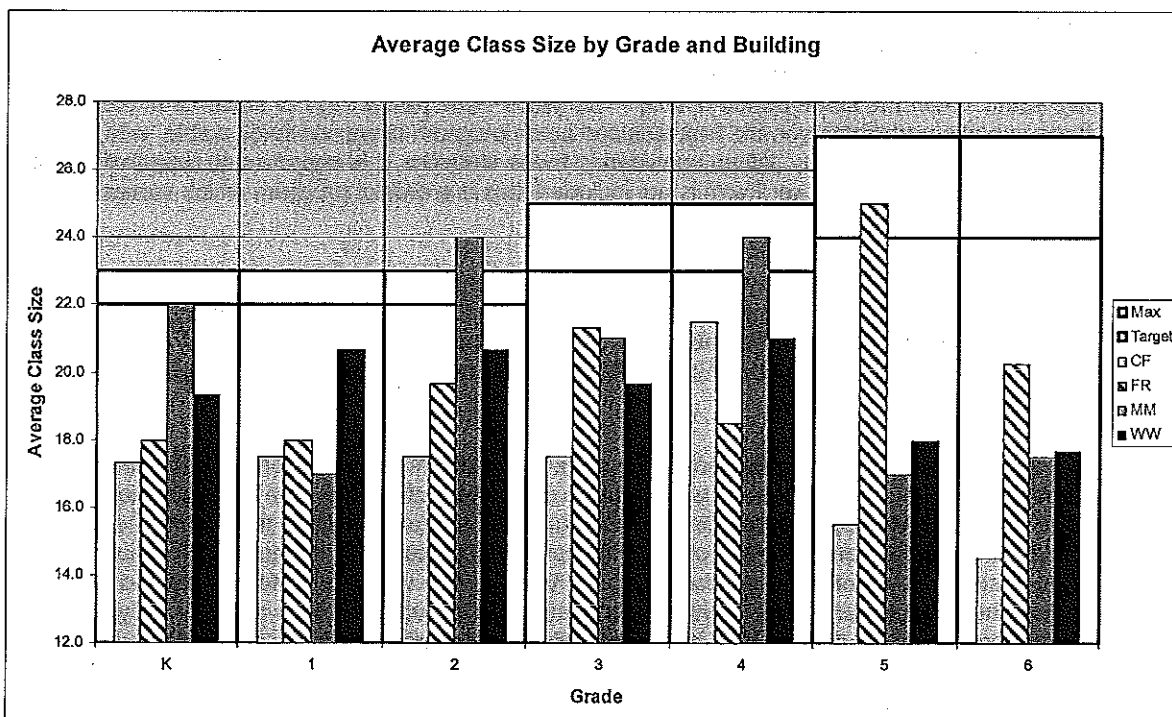


Figure 2. Comparison of the schools' average class sizes by grade. The class size targets and maximums are also shown. (Please note the vertical axis scale starts at twelve.)

The State of Our Schools – The Funding Gap

The Facilitation of the Community Choices Committee (FCCC) report from the fall of 2008 concluded that Amherst faces a serious and growing budget gap between projected revenues and the cost of providing the current level of municipal, school, and library services. If State aid remains constant, the budget shortfall is approximately \$2.66 million in FY2010, rising to \$10.2 million in FY2014. If State aid decreases by 15% next year, as it has in previous economic downturns, then the budget gap will be approximately \$5.2 million in FY2010 (see graph below, Figure 4). The full report can be found at the following web address: <http://www.amherstma.gov/index.asp?NID=802>.

History and Projections of Total Town Revenue and Expenditures

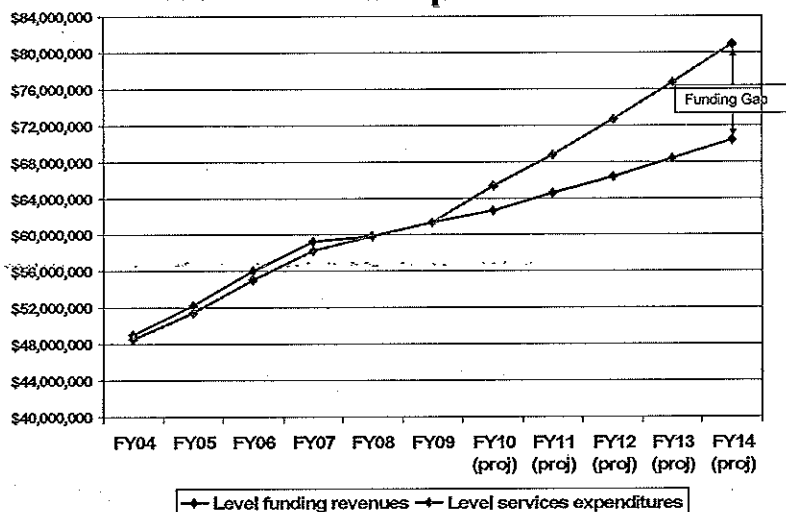


Figure 3. History and Projections of Total Town Revenue and Expenditures.

Unfortunately, even the grim scenario demonstrated above is better than our present reality. Current expectations are that Amherst faces a \$6.3 million dollar gap for next year – FY10 – which is almost \$1 million dollars worse than the chart above indicates – with an increasing gap in years beyond FY10.

The FCCC report notes that the budget gap for the next five years is of such magnitude that substantial cutbacks and restructuring will be required. Because personnel costs accounted for 86% of Amherst's spending in fiscal year 2009 (and about 80% of school costs), finding a way to limit the growth in personnel-related costs to a sustainable rate is therefore essential to the overall fiscal stability of the town. The FCCC suggested four methods: a) continuing to make savings on employee health insurance plan design, b) restricting future COLAs, c) reducing staffing, and d) implementing some combination of the previous three. Although the school district will work on both (a) and (b), it is also clear that significant staff reductions will also be necessary in order to limit growth in personnel-related costs to a sustainable rate. In sum, the structural deficit between what we receive from the town (based on taxes and state aid) and what it costs to run our schools is an on-going problem, meaning that we are and will continue to be choosing which programs and services to cut.

A Proposal: Moving to Three Schools

The school committee is currently considering a proposal to address a portion of the immediate and systemic budget problems by closing an elementary school (Mark's Meadow) and redistricting all elementary children into the remaining three schools. In addition to remediating some of the budgetary issues, this proposal will also address the systemic issue of socioeconomic inequity amongst the schools. This is a challenging endeavor, both in practical and emotional terms. Among the four schools, Mark's Meadow is the only possible candidate for closure because it is the smallest by eleven classrooms. Mark's Meadow is also the oldest of the four schools, is not owned by the town, and has higher administrative costs per student than the other three schools, due to its size. Mark's Meadow is also a successful school, long serving our North Amherst neighborhoods and families from the campus of the University of Massachusetts campus. However difficult it may be, financial constraints and enrollments have forced us to consider closing Mark's Meadow as an option.

If it is decided by the Amherst School Committee to close Mark's Meadow School, district administration will immediately work on a detailed plan for this major restructuring, establishing multiple, single-purpose teams to address the following:

- Redistricting – A concrete plan will be developed with consultants to establish new school zones within the next few months. School administrators have run preliminary numbers on this proposed change, and have developed two sample redistricting proposals, which are attached at the end of this report.
- Student Support – District and school leaders will create a plan to support the educational and emotional needs of students making school transitions.
- Staff Support – A district plan will be developed to redesign building staffing to minimize disruption to students making transitions and to thoughtfully reassign Mark's Meadow staff.
- Moving – A staged, year-long plan for relocation of educational materials, furniture and fixtures to other district locations will be developed and implemented..

In 2007, a demographics study of our schools and their capacity was conducted by NESDEC. While NESDEC does not take a position on local redistricting efforts, their report findings will help guide our process moving forward. Projections are also done annually at the district level, and the NESDEC projections are consistent with what the district projects. However, our enrollments and enrollment projections indicate that educating all K-6 elementary students in a three-building model is feasible for FY11 and beyond and is within the capacity of the schools. Based on our preliminary information, the following figures show how the resulting three schools might look in terms of socioeconomic equity and class sizes (see Figures 4 and 5 respectively).

If the motion to close Mark's Meadow School for FY11 passes, the district will work with consultants to ensure we are moving forward constructively and that we are not overlooking any factors that must be considered. This consultant will analyze and finalize our preliminary work on redistricting to ensure we are doing this work in an educationally sound and equitable manner. The two preliminary plans in the Appendix demonstrate options for redistricting within the parameters established by the motion.

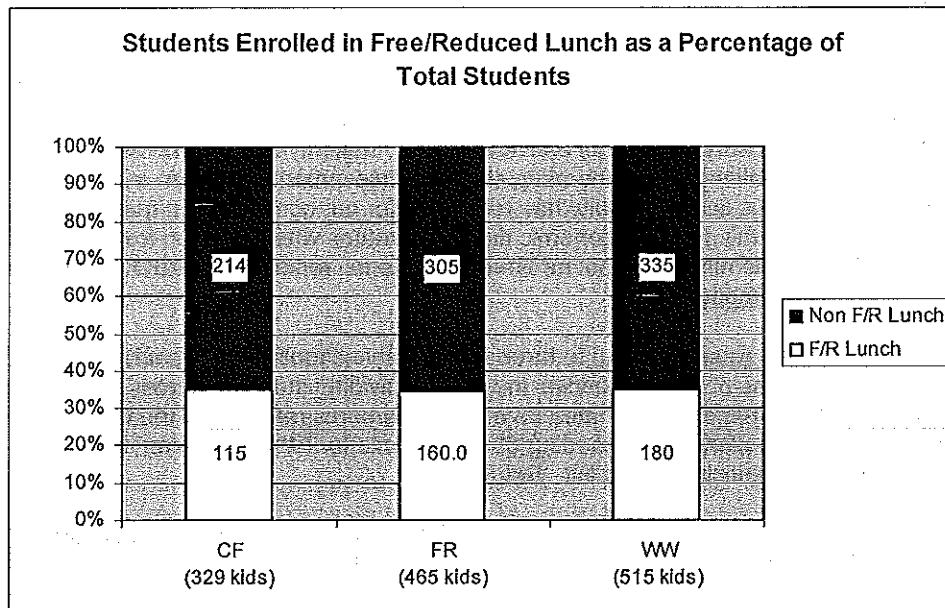


Figure 4. The projected percentage of students enrolled in Free/Reduced Lunch relative to the total students in each building for the 2010-2011 school year (see Rendition 2 in the Appendix for details).

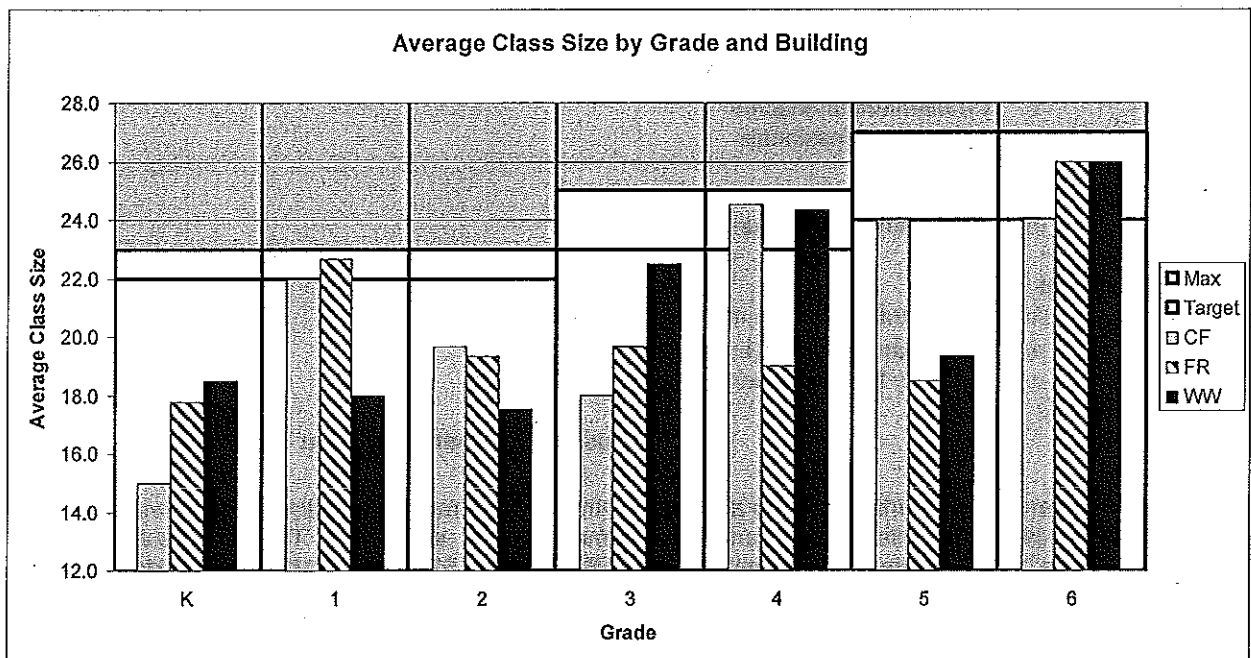


Figure 5. Comparison of the schools' average class sizes by grade projected for the 2010-2011 school year. The class size targets and maximums are also shown. (Please note the vertical axis scale starts at twelve.)

- Equity – As Figure 4 demonstrates, the proportion of children receiving free/reduced lunch would be decidedly more balanced amongst the schools. The schools percentage of students on free/reduced lunch would range from 33.8% to 35.7%. This is a significantly smaller gap (1.9% among schools) than our current system (32%). Why balance for equity? Quoting from the Amherst Schools Organization Report from 2008, “The ASOC looked at research on impact of concentrations of poverty on school effectiveness majority low-income schools face disproportionate challenges in generating student achievement was seen as compelling.” The Committee noted this issue of equity has relevance for our community in many ways, including the challenges that this type of economic disparity creates when children from such schools are joined together in the middle school for Grade 7. The full report of the ASOC can be found at: <http://www.arps.org/node/453>
- Class numbers and sizes –Moving to three elementary schools would result in a need for fewer classrooms (because of the efficiencies involved in dividing students across three schools instead of four). We would need an estimated 63 or 64 classrooms rather than the 69 we are using in FY09. Originally we planned on needing 69 classrooms for FY10, however, there are 2 classrooms on the anticipated cut list. See Figure 7.
- Financial savings – Moving from four to three schools would result in an initial estimated savings of \$532,000 and a reduction in the rate of growth of the budget in subsequent years, thus reducing the slope of the Level Services Expenditures line in Figure 3. These savings would be achieved as follows:

Reductions

o Reduction in district classrooms from 67 (FY10) to 64 (FY11)	\$162,000
o Reduction of principal and 2 secretaries	\$170,000
o 2.5 custodians	\$55,000
o 1.0 ELL teacher	\$54,000
o 1.0 Special Education teacher	\$54,000
o 1.0 Intervention teacher	\$54,000
o 1.13 paraprofessionals	\$15,000
o 1.0 LPN	\$35,000
o 1.0 librarian	\$54,000
o 1.0 IA paraprofessional	\$20,000
Total Reductions	\$673,000

Initial Costs

o Annual transportation increase (an ongoing expense)	\$16,000
o Moving and packing (a one-time expense)	\$70,000
o Prep day for all teachers (a one-time expense)	\$55,000
Total Costs	\$141,000

Thus, the estimated net Year 1 savings is: \$532,000

Notes: There may be further savings achieved by the ability to more efficiently deliver services to Special Education students, English Language Learner students, and others. The estimate above is conservative; there may be an additional savings of \$100,000 to \$200,000. At this time no determination has been made about the status of the two modular classrooms currently placed at Mark's Meadow School. Moving of the modulators is estimated to cost \$140,000. We project that we will be able to contain all our classrooms within Crocker Farm, Fort River and Wildwood Schools without use of the modulators. If it is decided that the modulators must be moved, the net Year 1 savings will be reduced to approximately \$392,000. Consideration may also be given to selling the modulators. Further, if regionalization occurs and if grade six moves to the middle school in a few years, the three remaining schools will have adequate classroom space to contain the K-5 enrollment.

The State of Our Schools – No Change to Current Structure

The choice is not between four schools as we know them and an unknown three-school model. The choice is between four schools with greatly diminished program quality and three schools that preserve \$532,000 in educational program offerings through greater efficiencies (\$673,000 after the first year.)

For FY10, the Town of Amherst faces severe reductions in State Aid. Distributing a proportion of State Aid cuts as proposed in the Governor's budget would require the schools to cut \$1.7M. Distributing a proportion of even deeper State Aid cuts as proposed by the House Ways and Means Committee would require the schools to cut \$2.1M. Town officials and the Budget Coordinating Group (BCG) are working to identify solutions to the budget gap. Meanwhile, the district is proposing cuts of \$1.1M, which includes Central Office and school-based cuts in each of the four schools. These cuts include significant administrative reductions, a decrease of 2 classrooms, cuts to intervention, aesthetics (art, music, physical education), instrumental music, clerical, paraprofessional and custodial staff. These cuts are drastic for our district - still, they do not meet the level of cuts indicated as necessary by the Town of Amherst.

The Amherst Finance Committee recognizes the value to Amherst of the schools' reducing operating costs by such a reorganization; however, it also recognizes the difficulty of making a change of this magnitude – closing a school - by Fall 2009. The Finance Committee has therefore indicated that it may be willing to recommend to Town Meeting to "fill in" the gap between proposed FY10 elementary cuts and the amount considered affordable by the Town by the use of Reserve Funds, if the School Committee has provided a substantial, sustainable organizational change for FY11. This would enable the district to avoid the additional cuts that would otherwise be necessary for FY10, while providing an appropriate amount of implementation time to make sure the reorganization is done as thoughtfully as possible.

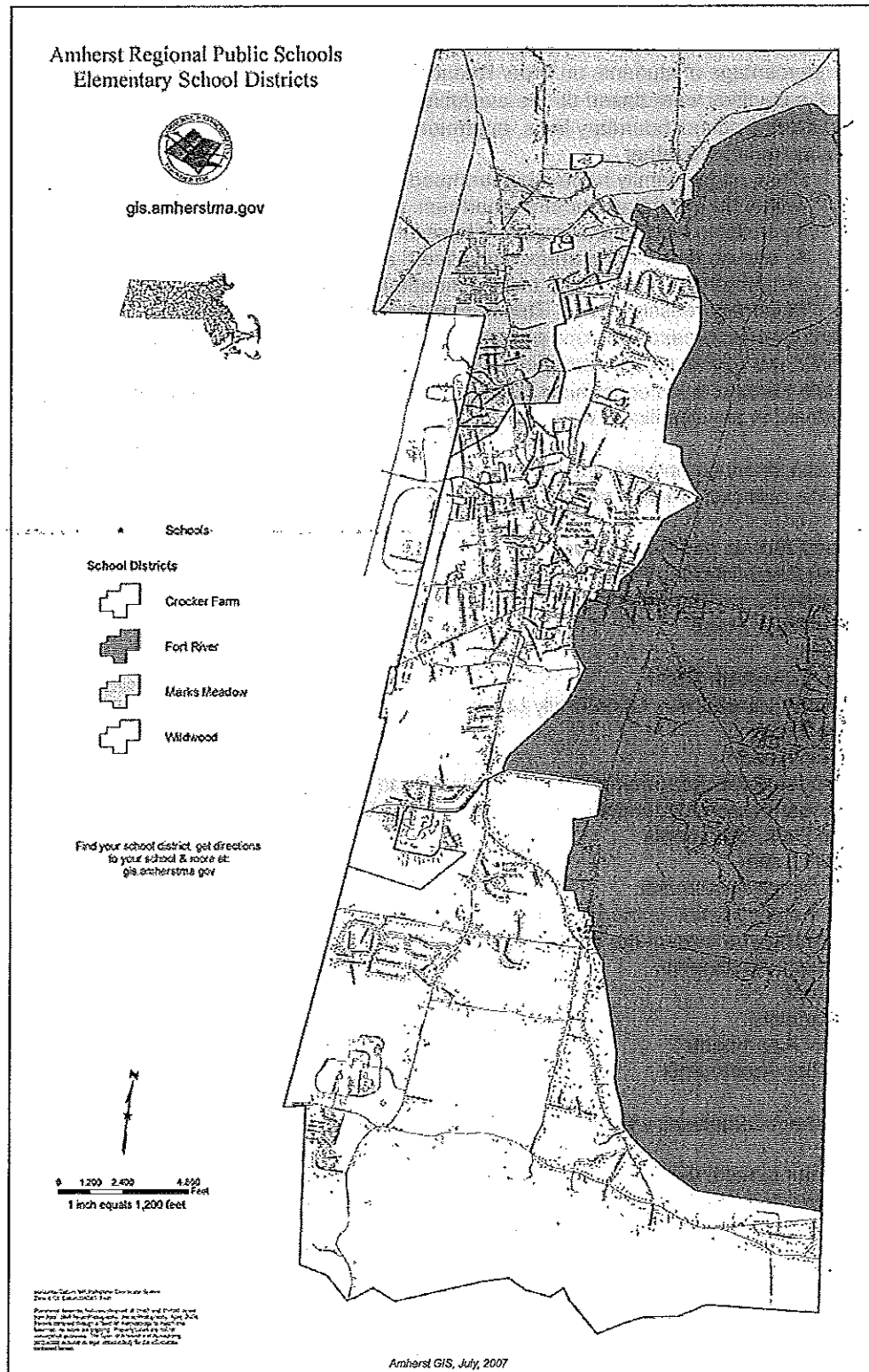
Appendix

In early March the possibility of closing Mark's Meadow and placing those students into the other schools was developed. This scenario looked at the current K-6 students as a starting point to aid in the drawing of school attendance boundaries. In this process the primary constraints applied to the scenario were to balance the socioeconomic spectrum in the schools as well as to relocate students within the classroom capacities of the remaining three schools. Once the initial boundaries were configured, the K-4 students were shifted up two grades (to approximate the FY11 enrollments) and estimates of the number of Kindergarten and first grade classrooms were made to project the overall classroom demand for the 2010-2011 school year if Mark's Meadow were to be closed (using projections for the number of Kindergarten and first grade children expected, 190 and 184 respectively, estimates for the enrollments in the buildings for 2010-2011 have been made).

In early April this school boundary reconfiguration was revisited. In this iteration and building on the expertise gathered in the previous rendition, a new reconfiguration was made for the 2010-2011 school year. As in the first rendition, the current K-6 students were used to redraw the lines and the current K-4 students were rolled forward two years to estimate enrollment in the second through sixth grades. Projections for the next two Kindergarten classes were used to approximate the 2010-2011 Kindergarten and first grade students (184 and 190). The same primary constraints of equity and capacity were applied to this reconfiguration. (The capacity constraint was changed slightly; please see the assumptions sections for details.)

The following pages will list the assumptions and definitions used, the grids of the numbers calculated, and maps of the current boundaries as well as the new scenarios. ***Please note that the work presented is PRELIMINARY.*** As more information is gathered (e.g., data on the incoming Kindergarten class gathered during pre-registration in May) these boundaries and the subsequent calculations will be revisited. **No decisions have been made regarding any boundary reconfiguration;** however, the exercise of making these preliminary calculations is instructive in exploring the choices we have before us.

Current School Boundaries



Rendition 1 – March 2009

Assumptions and Definitions

- The foremost criterion was to try to achieve balance among the elementary schools with respect to the percentage of students on Free/ Reduced Lunch.
- School capacities were based on the available rooms in each of the buildings.
- When shifting school boundary lines, apartment complexes and neighborhoods of single family homes were kept together.
 - Thus, single family home neighborhoods are not split based on streets within the neighborhood and apartment complexes have not been split by building within the complex. However, apartment complexes adjacent to one another (and perhaps considered as being in the same neighborhood) have been treated independent of each other for school boundary reassignment. This is consistent with the status quo.
- All demographic breakdowns and counts of students were based on March 3, 2009 data in PowerSchool (our student information system).
- Possible transportation constraints (such as physical limitations of turn around points) were not considered in any significant way.

The following apartment complexes and neighborhoods of single family homes were specifically considered in the process* (Please see the maps for the specific changes to the boundaries):

Amherst Woods and Pine Grove
Morgan Circle/Hitching Post Road
Grantwood Drive/Blackberry Lane
Rolling Ridge Road
Echo Hill
Harlow Drive/Van Meter
Sheerman Lane/Cherry Lane/Emily Lane
Rolling Green
Logtown Road
Gatehouse Road Apartments (30 Gatehouse Road)
Gatehouse Road Condominium Complexes (e.g., Winston Court, Emerson Court, etc.)
Village Park Apartments
Orchard Valley
North Village Apartments
Single Family Homes in the East Hadley Road area (mostly on the north side of the East Hadley Road and to the west of the apartment complexes)
Southpoint Apartments
The Brook
The Boulders
Hollister Apartments**
Mill Valley Apartments

*Apartment complexes were considered due to their size and location.

**Hollister is not a very large complex but its proximity to the others in the East Hadley Road area prompted its inclusion. Due to its size it was always paired with the Brook or Mill Valley with whom it shares the same street (Riverglade Drive).

Key to Enrollment Charts

SoC = Students of Color

IEP = Individualized Education Plan

504 = A different type of individualized education plan

LEP = Limited English Proficiency

No. of Students Affected = a count of those students whose current school is different from that based on the new boundaries. This count assumes that all students currently in schools via Open Enrollment are moved into the school associated with where they live.

K-6 in 3 Bldgs 3/3/2009

2010-2011 (shift K-4 up two grades)

Crocker Farm	K est.		1 est.		2		3		4		5		6		Total Students	Totals
Enrollment	54	3	53	3	65	3	39	2	47	2	55	3	57	3	370	19
a.c.s.	18.0		17.7		21.7		19.5		23.5		18.3		19.0		19.5	
Free/Reduced Lunch	15		15		25		14		17		16		10		112	30.3%
IEPs					9		7		10		12		9		47	12.7%
504s					0		1		0		0		3		4	1.1%
LEP					14		4		8		4		4		34	9.2%
SoC					27		19		22		24		18		110	29.7%
No. of Students affected	0		0		25		16		22		27		32		122	33.0%

Fort River	K est.		1 est.		2		3		4		5		6		Total Students	Totals
Enrollment	69	3	67	3	56	3	68	3	62	3	71	3	78	4	471	22
a.c.s.	23.0		22.3		18.7		22.7		20.7		23.7		19.5		21.4	
Free/Reduced Lunch	25		24		23		25		24		25		33		179	38.0%
IEPs					5		7		18		17		20		67	14.2%
504s					0		0		0		3		2		5	1.1%
LEP					8		16		7		8		14		53	11.3%
SoC					33		35		33		40		44		185	39.3%
No. of Students affected	0		0		30		31		30		34		42		167	35.5%

Wildwood	K est.		1 est.		2		3		4		5		6		Total Students	Totals
Enrollment	67	3	64	3	63	3	79	4	70	3	52	3	69	3	464	22
a.c.s.	22.3		21.3		21.0		19.8		23.3		17.3		23.0		21.1	
Free/Reduced Lunch	22		21		24		31		19		11		21		149	32.1%
IEPs					7		11		8		9		14		49	10.6%
504s					0		0		0		0		1		1	0.2%
LBP					15		14		10		7		13		59	12.7%
SoC					30		35		27		22		33		147	31.7%
No. of Students affected	0		0		20		28		20		12		22		102	22.0%

Students	1305	
Rooms	63	
a.c.s.	20.7	
Free/Reduced Lunch	440	33.7%

	Min		Max	
K	18	CF	23	FR,WW
1	17	CF	23	FR
2	18	FR	22	CF
3	19	CF,WW	23	FR
4	20	FR	24	CF,WW
5	17	WW	24	FR
6	19	CF,FR	23	WW

3/3/2009

Town of Amherst Basemap



- Close MM
- Other Schools K-6

- Wildwood
- Crocker Farm
- Fort River



0 0.25 0.5 1
0 1,000 2,000 4,000 6,000 Feet
1 inch equals 3,000 feet

Rendition 2 – April 2009

Assumptions and Definitions

The assumptions and definitions were the same for the second rendition as they were for the first with the following exception: The demographic breakdowns and counts of students were based on April 3, 2009 data.

K-6 in 3 Bldgs 4/3/2009

10-11' (shift K-4 up two grades)

Crocker Farm	K est.		1 est.		2		3		4		5		6		Total Students	Totals
Enrollment	45	3	44	2	59	3	36	2	49	2	48	2	48	2	329	16
a.c.s.	15.0		22.0		19.7		18.0		24.5		24.0		24.0		20.6	
Free/Reduced Lunch	15		15		24		14		19		17		11		115	35.0%
IEPs					10		4		11		8		9		42	
504s					0		1		0		0		3		4	
LEP					13		4		7		5		4		33	
SoC					26		15		22		25		15		103	
No. of Students affected	0		0		20		12		24		20		21		97	

Fort River	K est.		1 est.		2		3		4		5		6		Total Students	Totals
Enrollment	71	4	68	3	58	3	59	3	57	3	74	4	78	3	465	23
a.c.s.	17.8		22.7		19.3		19.7		19.0		18.5		26.0		20.2	
Free/Reduced Lunch	23		22		22		17		21		23		32		160	34.4%
IEPs					6		8		18		18		16		66	
504s					0		0		0		3		1		4	
LEP					9		14		9		7		12		51	
SoC					29		32		29		38		41		169	
No. of Students affected	0		0		14		16		11		19		22		82	

Wildwood	K est.		1 est.		2		3		4		5		6		Total Students	Totals
Enrollment	74	4	72	4	70	4	90	4	73	3	58	3	78	3	515	25
a.c.s.	18.5		18.0		17.5		22.5		24.3		19.3		26.0		20.6	
Free/Reduced Lunch	25		25		29		42		21		14		24		180	35.0%
IEPs					8		13		9		12		17		59	
504s					0		0		1		1		2		4	
LEP					17		14		11		7		15		64	
SoC					37		41		33		24		41		176	
No. of Students affected	0		0		28		41		32		17		35		153	




Students	1309	
Rooms	64	
a.c.s.	20.5	
Free/Reduced Lunch	455	34.8%

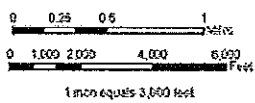
	Min		Max	
K	15	CF	19	WW
1	18	WW	23	FR
2	17	WW	20	CF,FR
3	18	CF	23	WW
4	19	FR	25	CF,WW
5	18	FR	24	CF
6	24	CF	26	FR,WW

4/3/2009

Town of Amherst Basemap



-  Wildwood
-  Crocker Farm
-  Fort River



Feedback

We are interested in getting feedback about this decision from parents, teachers/staff, and community members. All responses are completely anonymous. Please write your questions, concerns, comments, etc. below. You may also submit feedback via the Budget Suggestion Box on the school website. A Question & Answer document will be developed from your feedback. Thank you for participating in this community engagement process.

FREQUENTLY ASKED QUESTIONS

PROCESS

When will the school committee vote on the proposal to close Mark's Meadow?

The Amherst School Committee is scheduled to vote on the current motion at their May 19, 2009 meeting.

What influence should the new superintendent, Dr. Rodriguez, have in this decision?

Dr. Rodriguez has been kept apprised of the process thus far, and he is aware of the implications which accompany such a decision. Given the familiarity that school officials and school committee members have with the school district, Dr. Rodriguez is confident that a sound decision will be made, however challenging and difficult.

If Mark's Meadow closes, how will the district plan for this major change? What types of Committees will be formed to support a one-year transition?

We have not yet finalized the number of committees which will be responsible for facilitating the transition. Closing a school will be complicated and will involve a variety of individuals and groups to support the work. Initially, it has been determined that there will be groups responsible for student support, staff support and assignments, communications, data management, and moving of district property. Key to success of each of these groups will be how they are connected to each other and with the community. The district will need significant assistance from staff, from parents and from the community at large, but committees will be coordinated at the district level.

ENROLLMENT/SPACE

Can our students fit into three schools, or will the schools be overcrowded?

The School Committee has gathered extensive data about projected enrollments in our schools. In 2007, the School Committee hired the New England School Development Council (NESDEC) to compute demographic and enrollment projections for our elementary schools. This report clearly states that our projected enrollment in K to 6 through 2016-2017 varies from 1368 to 1417. However, our actual numbers for the 2008-2009 school year were less than those projected by NESDEC, thus to estimate future enrollments, actual enrollments in combination with projections were used to estimate the enrollments for the coming years. Based on this information, the remaining three schools can hold the projected enrollment.

Why do the NESDEC projections differ from projections done by the district?

The NESDEC report was done in spring of 2007 and was based on enrollments at that time. They were not able to consider the impact of the creation of the Chinese Charter School when their report was done. Plus, the district annually conducts a projection exercise based on actual enrollments each October 1. Our in-district projections have proven reliable over time and are somewhat lower than those prepared by NESDEC.

Will the remaining 3 schools have enough classroom space over time? How much time?

Enrollments are currently projected by the district through the 2013-2014 school year, and are based on birth census data annually gathered and shared by the Town of Amherst. Projected enrollments show a decrease in enrollment of 15 students for next year, with a further decrease over the next two-year period of 21 students. After that point, the 2012-13 school year, we are projecting an enrollment of 1359 students. Currently the 4 elementary schools have a total enrollment of 1324 students.

What about Grade 6 moving to the Middle School? What are the chances of this occurring?

If Grade 6 moves to the Middle School, it will free up an additional 8-10 classrooms at the elementary level. We have discussed the desirability of including Grade 6 students at the Middle School for several years. Such a design – a Grades 6-8 Middle School – is pedagogically appropriate and sound. A report is expected from the Regionalization Committee in the fall, which should give us a good indication whether K-12 regionalization with Pelham, Leverett, Shutesbury, and Amherst is likely to occur.

If Marks Meadow is closed, would the quads at Wildwood and Fort River be turned into 4 classrooms each?

Currently, the building quads are comprised of 3 actual classrooms and 1 smaller space reserved for small group instruction. The number of classrooms reported in the "State of Our Schools Report", does not depend on any change in the configuration of current classrooms.

Will there be changes to the present location of special needs programs?

No decision has been made at this time, but it is possible one or more programs will be moved.

What would be the impact of keeping Marks Meadow open and just increase class sizes throughout the district?

The likely result of this would be class sizes above recommended maximums and the transfer of some or all kindergarten students either to or from Mark's Meadow to the other three elementary schools to better equalize these class sizes and more efficiently distribute staff. This would increase the cost of transporting students, but the costs would be far less than the cost of an increased number of classrooms.

Why not close part or half of Fort River or Wildwood instead of closing Mark's Meadow, thereby creating 1 more "small" school?

Both Fort River and Wildwood Schools are small learning communities by many measures. Further, it is not practical to keep part of a building vacant. We will still be responsible for insurance, energy, cleaning, and maintenance costs. We would still have administrative and support costs – a principal, secretaries, custodial, etc. Also, since the cafeteria and gymnasium spaces are on opposite ends of each building, space could not be completely shut down. Leaving Mark's Meadow open with its 12 classrooms and reducing the number of classrooms at either Fort River or Wildwood will not address the needed efficiency of more equally dividing students across classrooms to maintain small class sizes:

Fort River and Wildwood school buildings have proposals in to the state for construction funds to update the buildings. Where will we put the students if/when these projects get underway?

When Crocker Farm was expanded and renovated some years ago, careful consideration was given to the beginning and end dates of the annual district school calendar to accommodate the work of construction/renovation crews and to minimize disruption to students and staff during the school year. We anticipate similar planning for any upcoming renovations, which at this point will not be underway for several years.

REDISTRICTING

Could we redistrict to solve equity and then have four elementary schools?

Although it is possible to redistrict to better apportion equity in our current four elementary schools and a plan for this was presented in draft form to the community in April, there are two problems with this plan. First, it would not be in the best interest of children to redistrict now for equity and then redistrict again in one or two years for fiscal or enrollment reasons. This could be very difficult for children and their families. Second, redistricting and using four elementary schools would require two or three more teachers than our current system, at an estimated cost of \$108,000 to \$162,000 more per year. Thus, redistricting to four elementary schools solves our equity problem, but increases our financial problem.

We were able to view preliminary redistricting maps. When might a final redistricting plan be in place?

The preliminary plan must be reviewed by a consultant or consultants familiar with the challenges of redistricting and the implications of transportation routes. If it is voted to close Mark's Meadow, it is hoped we can secure a consultant right after the School Committee vote and have more definitive information to share by the end of June.

STUDENT ASSIGNMENTS/SUPPORT

Will all current Open Enrollments end no matter how many years they've been in place, and will only those applications associated with an IEP or 504 will be considered in the future?

There is presently a school committee policy which permits students from Amherst to attend their non-neighborhood school. Open enrollment is granted only if space is available in the requested school and if parents are willing to provide daily transportation. The School Committee will want to revisit this policy and see whether it can be sustained under a redistricting scenario, and whether such a policy creates school inequities.

How will the district address the special issues of families and students who, while they may be able to walk to their present school, may not be able to do if they are redistricted?

One of the teams that will be created if it is decided to close Mark's Meadow School, will address student and family support. Our schools have active parent groups in each. It is our hope we can work together with these groups to assist and/or resolve any impediments to school accessibility.

BUDGET/FINANCIAL

What is the budget problem for the Town of Amherst?

In November the Amherst Finance Committee issued preliminary FY2010 budget guidelines. At that time they suggested a 2.0% increase to town department and school budgets, and a 3.5% increase to the assessment to the town of Amherst for the Regional budget. For the Amherst schools that would have required that \$658,000 be cut from a level services budget.

The economic downturn has severely impacted state and local government funding across the country. Anticipating a \$3 billion revenue shortfall for FY2010, the Governor's budget recommended a reduction in lottery aid and in additional assistance to municipalities in January. The reduction for Amherst was projected to be \$2.77 million from the original FY2009 level. In April the State House Ways and Means Committee released its budget recommendation which cut state funding even further. Revenue projections for the Town of Amherst are following the same trend: current data paint a picture that is worse than earlier projections. Lower than expected lodging tax revenue and lower than usual growth in the tax base.

With the reduced revenue projections, the Town is now facing a funding gap of \$3.8 million in funding the Finance Committee's original guidance for FY2010 budgets.

What solutions are being considered by the Town?

The Budget Coordinating Group of the Town of Amherst, comprised of representatives from the boards and senior staff of each of the four budget entities (town, libraries, Amherst elementary schools, and the Regional School District), has been meeting on a regular basis to monitor and plan for meeting the fiscal challenge facing the town. Each department has identified the level of cuts beyond which major restructuring would be necessary for next year. These further cuts, along with projected increased local revenue for the town next year, reduced the funding gap to \$2.48 million.

Last week the House voted to increase the sales tax from 5.0% to 6.25%, and separately voted to allocate \$205 million to replace some of the aid to towns that was cut. It is anticipated that \$1.68 million from that source would flow to Amherst. However, this sales tax increase must also be passed by the Senate and signed into law by the Governor in order to be enacted.

The Budget Coordinating Group will recommend that the remaining gap be covered from reserves, with the understanding that any additional funding from the state or local option taxes be used first to make the reserve fund whole. The Finance Committee will discuss this concept at their next meeting.

If the legislature decides to increase sales tax, when would the revenue be realized? How much revenue increase can be expected if this occurs?

Revenue from increased sales tax would begin to be available in FY2010. Early projections are noted above.

What about other sources of potential revenue - the meals tax, etc.?

The State Legislature will be considering some other sources of potential revenue, including some form of meals tax, a hotel/motel tax, and a measure to close a telecommunications tax loophole. These measures will likely be debated in May. Current outlook for these initiatives is pessimistic, due in part to the recently voted increase to the sales tax.

Aren't there other ways to decrease our budget problem? Could we accept School Choice students at the elementary level?

School Choice students bring in \$5,000 each per year. Consideration is given each year to targeting specific schools and grades where choice slots might be made available – mostly; at Crocker Farm and at Mark's Meadow, where class sizes tend to be smaller. However, the Amherst School Committee has been and is concerned about the possibility, over time, of overcrowding at the Regional level since there have been successive years of academic and elective cuts at the Region. School Choice regulations provide that if a student is accepted by a K-6 school district, they are entitled to attend the Regional district to which that town belongs.

If we keep four elementary schools open next year, what types of changes will we see in the schools?

To keep the four elementary schools open next year requires a cooperative process among all Town departments, including the willingness to use some funding from reserves if additional funding does not fill the revenue gap. This plan allows a year to properly plan to close a school and redistrict students into three remaining elementary schools. This plan calls for cutting \$1.14 million from the level services budget for the Amherst schools for FY2010. These cuts are listed elsewhere.

What will likely be cut if Mark's Meadow School remains open past June 2010?

In this uncertain fiscal environment it is difficult to project to FY2011 and beyond. If we assume that the recession will not recover quickly and that state funding will be flat, and that the town will only be able to allow a 2.5% growth to the budget, we can anticipate having to cut another \$1.3 million from a level services budget in FY2011.

Cuts of this magnitude - \$1.3 million - without closing a building might be as follows:

- Centralized librarian to support 4 buildings
- Centralized computer teacher to support 4 buildings
- Elimination of after school buses and programming
- Reconsideration of current instructional materials
- Significantly increased class sizes at all levels

If Mark's Meadow is closed, a savings of \$530,000 is anticipated for the first year. This partial solution would then point to the need for an additional \$740,000 in cuts.

I understand that a decision to close Mark's Meadow will not eliminate the total budget gap for FY10 or FY11. How will the district address the gap for those years?

Beyond FY10, we will need to understand the implications of any additional tax revenue, identify the remaining gap, and then project anticipated district needs. As stated in the FCCC Report, an override for FY11 will likely be necessary to sustain the FY10 level of services to students.

Could we pass an override?

The FCCC report recognized that an override will probably be necessary at some point in the next 5 years to sustain even the most essential school and municipal services. However, all members of that committee agree that an override will not solve Amherst's long-term budget gap and substantial cutbacks will be necessary regardless.

GRANT FUNDING - TITLE 1

How will closing a school and redistricting impact the Title 1 funds we receive for low income students?

Redistricting will not decrease the Title I funding since it is based on a Town-wide census of our economically disadvantaged students. The change in school boundaries will, however, allow us to reapportion Title I funding to different schools based on the needs of the students in those schools.

REGIONALIZATION

How does this discussion fit in with the broader discussion about regionalizing our elementary schools with Pelham, Leverett, and Shutesbury, the way our middle school and high school are currently?

We are still unsure of the impact of potential regionalization and what the structure of all the schools might look like. The decision about closing Mark's Meadow has no apparent, direct impact on regionalization discussions.

RELATIONSHIP WITH THE UNIVERSITY OF MASSACHUSETTS

Will UMass take the Mark's Meadow building back if we close the school? Is there any discussion of ways to retain the building in case we need it later, so we don't end up building a new school if enrollments increase?

The disposition of Mark's Meadow School needs to be discussed with UMass officials, and they have been invited to enter into dialogue with district officials. It is our hope that the building can be maintained for alternate district programs – South Amherst Campus and East Street Alternative High School – so that post secondary programs can be developed to support these students.

If the University agrees to let the district use Marks Meadow for secondary in-district programs, will there be costs related to this change?

There may be minor changes to bathroom fixtures to accommodate adolescents, but we do not foresee any major building costs associated with relocation of in-district programs.

You have identified Marks Meadow as the logical school to close in the detailed proposal. Can the district be more specific about why it would consider closing a school which is provided for free by the University of Massachusetts?

It's true that Mark's Meadow is "free" in terms of utilities, but it is not free in terms of what it costs the district to operate this building (teachers, staff, materials, buses, etc.). The reality is that all of our elementary students can fit in the other three buildings at a cost that is roughly \$700,000 a year less than keeping this building open. We also believe strongly that if we were to move to three elementary schools, we would either be able to use this building for free for another purpose (the alternative high school programs) or receive an annual payment from UMass for educating children of their graduate students. Thus, either of these options would more effectively allocate our limited resources than continuing to use MM as an elementary school. In addition, the timing of possibly closing Mark's Meadow may work within the timing of regionalization efforts.

If it really saves this much money, and it really is inevitable, then why not just rip off the Band-Aid and close Marks Meadow for 2009-2010, rather than hoping to convince the Finance Committee to support some use of reserves for FY10—not enough reserves to prevent a number of additional cuts that could affect all kids—and then hoping to convince Town Meeting to agree to such a Finance Committee recommendation?

This would be a daunting task to thoughtfully complete by September 09 and there are many components that must be considered. First and foremost are considerations of the health and safety of students. Next we need to carefully plan the manner in which the remaining 3 buildings will be staffed. We need to be sure that students from all schools can see familiar adults and have an opportunity to get used to a new school setting. Issues such as transportation, materials, furniture, equipment, books, etc., need to be carefully planned over time.

How can we keep everyone informed if it is voted to close Mark's Meadow in June 2010?

One of the teams which would be created would involve communication, so that there will be a central clearing house for information to the families, staff, and the community.

$$= \frac{1}{\sqrt{\pi}} \int_{-\infty}^{\infty} e^{-t^2} dt = \frac{1}{\sqrt{\pi}} \cdot \sqrt{\pi} = 1$$

$\frac{d}{dt} \left(\frac{1}{\sqrt{1-v^2/c^2}} \right) = \frac{v}{c^2} \frac{dv}{dt}$

Employee Benefits	Increase Health Insurance Co-Pays	(85,442)	(549,420)
Employee Benefits	Life Insurance increase basic to \$10,000	10,110	(539,310)
Town Mgr/Select Board	Part-Time Clerical	(20,000)	(559,310)
IT	Staff Reduction/Reorganization	(64,612)	(635,422)
IT	Delay Email Outsourcing	(20,000)	(655,422)
Police	Transfer 50% Info Specialist to IT	(30,538)	(685,960)
IT	Transfer 50% Info Specialist to IT	30,538	(655,422)
Veterans	Regionalization	-0.40	(660,422)
LSSE	Program/Staff Cuts & Increased Fees	(65,307)	(737,229)
LSSE	Close War Memorial Pool (net)	(41,840)	(779,069)
Communications Ctr	Extra Help & OT	(20,000)	(799,069)
Fire/EMS	Overtime (minimum manning to 7)	(80,000)	(879,069)
Police	3 Officers	(121,145)	(1,034,714)
	SUBTOTAL - TIER 2	(570,736)	(570,736)
	TOTAL CUTS - TIER 1 & 2	(1,034,714)	(1,034,714)
	Additional Cuts/Revenue to Target	(278,644)	(278,644)
	CUT TARGET (as of 5/28/09)	(1,313,358)	18,334,860
			-1.4%
	Municipal 33.4% Share of Remaining Gap (No New Revenues or Reserves Used)	(668,000)	(668,000)
	TOTAL CUTS	(1,981,358)	17,666,860
			-5.0%

SUMMARY

	FY 07 Actual	FY 08 Budget	FY 08 Actual	FY 09 Budget	FY 10 Manager	FY 10 Cuts/Add	FY 10 Fin Com	Change FY 09 - 10	Percent Change
General Government	\$ 5,423,700	5,765,139	5,627,681	5,989,728	6,237,576	(485,550)	5,752,026	(237,702)	-4.0%
Public Safety	\$ 8,020,321	8,071,970	8,063,272	8,265,817	8,567,069	(251,683)	8,315,386	49,569	0.6%
Public Works	\$ 1,735,257	1,690,501	1,859,422	1,756,999	1,843,942	0	1,843,942	86,943	4.9%
Planning, Conservation & Inspections	\$ 837,407	871,881	802,423	859,656	886,562	0	886,562	26,906	3.1%
Community Services	\$ 1,861,638	1,743,604	1,680,488	1,719,363	1,649,091	(115,454)	1,533,637	(185,726)	-10.8%
TOTAL APPROPRIATION	\$ 17,878,322	18,143,095	18,033,287	18,591,563	19,184,240	(852,687)	18,331,553	(260,009)	-1.4%

FC
5/28/09

PUBLIC SAFETY

	FY 07 Actual	FY 08 Budget	FY 08 Actual	FY 09 Budget	FY 10 Manager	FY 10 Cuts/Add	FY 10 Fin Com	Change FY 09 - 10	Percent Change
Police Facility	\$ 185,231	170,870	197,894	181,996	210,791		210,791	28,795	15.8%
Police	\$ 3,863,415	3,860,369	3,863,252	3,886,529	4,050,891	(151,683)	3,899,208	12,679	0.3%
Fire/EMS	\$ 3,392,809	3,447,287	3,430,105	3,583,493	3,681,839	(80,000)	3,601,839	18,346	0.5%
Communications Center	\$ 541,488	548,009	528,339	564,575	571,703	(20,000)	551,703	(12,872)	-2.3%
Animal Welfare	\$ 37,379	45,435	43,682	49,223	51,845		51,845	2,622	5.3%

TOTAL APPROPRIATION	\$ 8,020,321	\$ 8,071,970	\$ 8,063,272	\$ 8,265,817	\$ 8,567,069	(251,683)	\$ 8,315,386	49,569	0.6%
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SOURCES OF FUNDS

Ambulance Receipts	\$ 1,449,630	1,505,790	1,505,790	1,798,030	2,005,275		2,005,275	207,245	11.5%
Departmental Receipts	\$ 142,530	143,800	163,582	143,800	146,100		146,100	2,300	1.6%
Educational Incentive	\$ 167,714	194,059	181,796	193,159	193,156		193,156	(3)	0.0%
Fines	\$ 162,152	140,000	122,360	140,000	140,000		140,000	0	0.0%
Licenses & Permits	\$ 11,105	8,000	11,451	8,000	8,000		8,000	0	0.0%
Unass Contribution	\$ 80,000	165,727	299,232	0	0		0	0	0.0%
Transportation Fund	\$ 4,911	4,932	4,932	4,939	5,170		5,170	231	4.7%
Taxation	\$ 6,002,279	5,909,662	5,774,129	5,977,889	6,069,365		6,069,365	91,476	1.5%

PUBLIC WORKS	FY 07/ Actual	FY 08 Budget	FY 08 Actual	FY 09 Budget	FY 10 Manager	FY 10 Cuts/Addis	FY 10 Fin Com	Change FY 09 - 10	Percent Change
Public Works Administration									
Highway	\$ 218,094	246,534	238,588	256,589	288,385		288,385	11,796	4.6%
Snow & Ice Removal	\$ 551,910	521,049	542,838	554,016	578,800		578,800	24,784	4.5%
Street & Traffic Lights	\$ 161,930	182,210	286,777	189,410	240,410		240,410	51,000	26.9%
Equipment Maintenance	\$ 103,679	105,887	101,915	112,248	112,248		112,248	0	0.0%
Town Cemeteries	\$ 260,501	240,266	271,245	252,530	259,245		259,245	6,715	2.7%
Parks, Commons &	\$ 19,378	23,295	17,250	18,773	19,957		19,957	1,184	6.3%
Downtown Maintenance									
Tree Care & Pest Control	\$ 272,212	247,348	263,893	250,166	286,086		286,086	35,920	14.4%
	\$ 147,552	123,912	136,917	123,267	78,811		78,811	(44,456)	-36.1%

TOTAL APPROPRIATION	\$ 1,735,257	1,690,501	1,859,422	1,756,999	1,843,942	0	1,843,942	86,943	4.9%
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SOURCES OF FUNDS									
Departmental Receipts	\$ 29,115	26,550	32,910	26,550	26,800		26,800	250	0.9%
Reserve Fund	\$ 0	0	0	0	0		0	0	0
Water Fund	\$ 190,702	188,129	188,129	191,753	195,023		195,023	3,270	1.7%
Sewer Fund	\$ 130,038	130,275	130,275	144,331	143,769		143,769	(562)	-0.4%
Transportation Fund	\$ 41,777	38,438	38,438	40,183	43,919		43,919	3,736	9.3%
Taxation	\$ 1,343,625	1,307,109	1,469,670	1,354,182	1,434,431		1,434,431	80,249	5.9%

PLANNING, CONS, INSPECTIONS

	FY 07 Actual	FY 08 Budget	FY 08 Actual	FY 09 Budget	FY 10 Manager	FY 10 Cuts/Addrs	FY 10 Fin Com	Change FY 09 - 10	Percent Change
Conservation	\$ 209,996	209,452	217,021	228,464	239,634		239,634	11,170	4.9%
Planning	\$ 275,678	291,382	286,381	285,094	299,928		299,928	13,834	4.8%
Inspection Services	\$ 351,732	371,047	299,021	345,098	347,000		347,000	1,902	0.6%

TOTAL APPROPRIATION	\$ 837,407	871,881	802,423	859,556	886,562	0	886,562	26,906	3.1%
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SOURCES OF FUNDS

Departmental Receipts	\$ 80,373	63,700	74,416	62,800	68,400		68,400	5,600	8.9%
Licenses & Permits	\$ 440,100	325,347	508,110	299,398	295,700		295,700	(3,698)	-1.2%
Rental of Land	\$ 2,016	0	4,165	0	0		0	0	0.0%
Grants	\$ 8,000	8,000	8,000	8,000	8,000		8,000	0	0.0%
Water Fund	\$ 13,911	14,370	14,370	15,028	16,433		16,433	1,405	9.3%
Golf Course Fund	\$ 0	0	0	0	0		0	0	0.0%
Transportation Fund	\$ 5,701	5,723	5,723	5,532	4,903		4,903	(629)	-11.4%
Taxation	\$ 423,250	454,741	449,189	468,898	493,126		493,126	24,228	5.2%

COMMUNITY SERVICES

	FY 08 Actual	FY 08 Budget	FY 08 Actual	FY 09 Budget	FY 10 Manager	FY 10 Cuts/Addds	FY 10 Fin Com	Change FY 09 - 10	Percent Change
Public Health	\$ 297,678	285,465	254,667	278,543	283,844		283,844	5,301	1.9%
Senior Center	\$ 206,650	198,866	192,519	192,584	197,007		197,007	4,423	2.3%
Community Development	\$ 177,315	111,477	89,514	83,161	0		0	(83,161)	-100.0%
Veterans' Serv. & Benefits	\$ 188,401	132,902	193,139	156,388	173,339	(5,000)	168,339	11,951	7.6%
Leisure Services & S.E.	\$ 587,540	637,704	589,862	628,544	622,402	(53,914)	568,488	(60,056)	-9.6%
Pools	\$ 187,243	168,480	151,472	169,887	153,694	(56,540)	97,154	(72,733)	-42.8%
Town Commemorations	\$ 1,116	875	1,405	875	875		875	0	0.0%
Golf Course	\$ 215,696	207,835	207,910	209,381	217,930		217,930	8,549	4.1%
TOTAL APPROPRIATION	\$ 1,861,638	1,743,604	1,680,488	1,719,363	1,649,091	(115,454)	1,533,637	(185,726)	-10.8%

SOURCES OF FUNDS

Departmental Receipts	\$ 596,089	595,124	622,633	647,681	840,855	(3,307)	837,548	189,867	29.3%
Licenses & Permits	\$ 80,020	80,325	74,459	80,325	79,700		79,700	(625)	-0.8%
Fines	\$ 100	4,000	1,375	4,000	4,000		4,000	0	0.0%
State Reimbursement	\$ 26,776	68,842	91,850	100,873	100,873		100,873	0	0.0%
Sewer Fund	\$ 2,000	2,000	2,000	2,000	2,000		2,000	0	0.0%
Taxation	\$ 1,178,511	1,032,340	943,653	925,063	665,733		665,733	(259,330)	-28.0%

GENERAL GOVERNMENT

	FY 07 Actual	FY 08 Budget	FY 08 Actual	FY 09 Budget	FY 10 Manager	FY 10 Cuts/Adds	FY 10 Fin Com	Change FY 09 - 10	Percent Change
Select Board/Town Manager	\$ 226,894	236,559	227,745	238,327	241,464	(20,000)	221,464	(16,863)	-7.1%
Town Meeting/Finance Comm	\$ 886	800	628	800	800		800	0	0.0%
Finance Department	\$ 771,128	775,777	775,145	819,185	854,102		854,102	34,917	4.3%
Legal Services	\$ 144,164	110,000	171,414	95,000	95,000		95,000	0	0.0%
Human Resources/ Human Rights	\$ 180,759	188,080	201,115	197,008	140,362		0	(56,646)	-28.8%
Information Technology	\$ 450,823	438,799	452,116	467,585	517,914	(54,074)	140,362	(56,646)	-0.8%
Town Clerk's Office	\$ 141,237	141,384	147,262	152,829	163,043		463,840	(3,745)	6.7%
Elections & Registration	\$ 58,691	42,325	35,046	54,824	28,524		163,043	10,214	-48.0%
Facilities Maintenance	\$ 429,353	435,089	436,354	461,297	491,322		28,524	(26,300)	6.5%
General Services	\$ 431,146	434,861	368,733	405,361	410,321		491,322	30,025	1.2%
SUBTOTAL	\$ 2,835,081	2,803,674	2,815,558	2,892,216	2,942,852	(74,074)	2,868,778	(23,438)	-0.8%
Employee Pay/Benefits	\$ 2,588,620	2,961,465	2,812,123	3,097,512	3,294,724	(411,476)	2,883,248	(214,264)	-6.9%
TOTAL APPROPRIATION	\$ 5,423,700	5,765,139	5,627,681	5,989,728	6,237,576	(485,550)	5,752,026	(237,702)	-4.0%

SOURCES OF FUNDS

Ambulance Receipts	\$ 91,745	113,821	113,821	85,788	88,987		113,821	28,033	32.7%
Departmental Receipts	\$ 152,836	145,895	221,530	149,254	135,754		220,984	71,730	48.1%
Interest From Taxes	\$ 179,434	146,500	142,909	144,000	144,000		167,500	23,500	16.3%
Investment Income	\$ 439,706	350,000	431,421	342,500	260,000		(0)	(342,500)	-100.0%
Licenses & Permits	\$ 146,083	142,650	154,945	142,650	142,650		154,945	12,295	8.6%
State Aid-Elections	\$ 5,580	7,289	6,403	7,500	0		7,848	(7,500)	-100.0%
Hours Reimbursement	\$ 155,627	165,931	165,931	161,017	165,647		165,931	4,914	3.1%
Water Fund	\$ 166,301	175,688	175,688	167,496	171,937		175,688	8,192	4.9%
Sewer Fund	\$ 32,234	33,892	33,892	33,316	36,950		33,892	576	1.7%
Transportation Fund	\$ 4,241,086	4,552,639	4,395,130	4,753,869	5,091,651		4,905,805	151,936	3.2%
Taxation									

May 28, 2009

To: Finance Committee

From: Bonnie Isman, Library Director

FY 2010 Budget Proposal for Library Services

At their meeting May 27, 2009 The Board of Library Trustees voted to support a Library Services budget of \$2,128,288 for Fiscal Year 2010. This includes \$1,502,733 from Town tax support, \$85,229 in State Aid to Libraries, \$441,326 from the Jones Library, Inc. endowment, and \$99,000 in private gifts and donations. The proposed budget for FY 2010 is 0.7% less than the budget for FY 2009.

In a normal year, the proposed budget would be \$2,209,182 (+3.1%) in order to maintain current information services, hours of operation, and acquisition of new books and AV materials. In fact, usage of the library has increased, both in borrowing and in visits to all library branches during FY 2009. During tough times like the current recession, the public depends on free access to libraries for books, news media, and the internet. Town Libraries offer essential services that people need for their personal economic recovery, such as computers to apply online for jobs and locate government benefits, and ways to learn new business skills.

In light of the limitations on local tax resources and reductions in local aid for cities and towns, the Trustees budget for FY 2010 requests only the minimum Town appropriation necessary to qualify for State Library Aid from the Mass. Board of Library Commissioners (MBLC). Amherst will be eligible to apply for about \$70,000 in State Library Aid, IF the Town appropriates this amount. If this amount is cut, we are at risk for losing our state certification, losing the \$70,000, losing eligibility to apply for federal library grants, and worst of all, Amherst residents will no longer be able to borrow from other libraries in Massachusetts by interlibrary loan or in person. Certified libraries are only required to serve residents of other certified library towns.

The proposed budget includes a major cut of \$76,000 (about 30%) for new acquisitions of books, AV materials, and online databases. This is the first time that such a cut will be possible, due to a change in MBLC regulations. Starting in FY 2010 the 13% requirement for materials will be based on the municipal appropriation, not the total of all expenditures at the end of the year. The good news is that this reduction allows all other library programs to remain open their current hours of service. The bad news is that borrowers will be less likely to find current titles available on the shelf, and more requests will be logged for delivery of books from other libraries, adding to staff workload. In addition, staffing in the Technical Services Department will be reduced by about \$5,000.

Handouts from the Trustees Meeting are attached.

REVISION based on FinCom handouts 5/27/09 -- Bonnie Isman

REVENUES worksheet	FY 2009	FY 10 Level Services	FY 2010 MAR	Worst Case- 5/21/09	(MAR to worst)
Town Tax support	\$ 1,490,385	\$ 1,585,627	\$ 1,502,733	\$ 1,452,844	\$ (49,889)
State Aid to libraries	\$ 100,000	\$ 85,229	\$ 85,229	\$ 85,229	\$ -
Endowment distribution (5.4%)	\$ 472,412	\$ 441,326	\$ 441,326	\$ 441,326	\$ -
Available Gifts & donations	\$ 80,550	\$ 97,000	\$ 99,000	\$ 99,000	\$ -
TOTAL	\$ 2,143,347	\$ 2,209,182	\$ 2,128,288	\$ 2,078,399	\$ (49,889)

% Diff from FY 2009

% Diff FY 09 Town Funds

\$ Diff from "Level Services"

if Town Funds - 1.5%

3.1%
6.4%
65,835 \$
22355.775

-0.7%
0.8%
(80,894) \$
\$

-3.0%
-2.5%
(130,783)
1,468,029

Added Revenue Options: DETAIL:

A. FY 10 Gifts and donations include:

- B. \$ 47,000 Annual fund drive REV.
- C. \$ 6,000 Replacement fund
- D. \$ 21,000 Beds for books and new Friends gift
- E. \$ 11,000 ESL fund raising
- F. \$ 9,000 Room rentals, memorial funds
- F. \$ 5,000 Balance of Town Gift Fund

Sub Total \$ 99,000

G. ADD, IF Worst Case Town Funding:

- H. \$ - Endowment at 5.5%
- I. \$ - New Branch fund raising
- J. \$ - Holland match for North
- K. \$ - Friends DVD rental program
- L. \$ - Donation boxes and tour donations
- L. \$ - Increase Replacement charge

Sub Total \$ -

Finance Committee
5/28/09
1,468,029
85,239
441,326
99,000
2,093,594
- 1.6%
- 1.5%

BUDGET worksheet		FY 2009	FY 10 Level Services	FY2010 MAR	Worst Case- 5/21/09	(MAR to worst)
Salaries	\$	1,352,965	\$	1,411,536	\$	1,357,984
Benefits (Town and Jones)	\$	259,416	\$	253,335	\$	253,335
Materials	\$	239,408	\$	247,000	\$	169,769
Operating Exp.	\$	291,558	\$	297,311	\$	297,311
TOTAL	\$	2,143,347	\$	2,209,182	\$	2,078,399
					\$	(49,889)

Staff Proposed

Cuts

M. MAR	Cut Bk Repair	\$	4,894	Hourly staff reduction
N.	Lower Materials	\$	5,000	Lower total budget
O.	New MBLC reg's	\$	71,000	Based on Town \$ only
		\$	80,894	

P. Worst Case:	Close 4 hours on Sun	\$	12,935	Stay open on Monday pm
Q.	Furlough prof staff	\$	10,933	Salary cut one week
R.	Cut shelving staff	\$	9,540	Rely on volunteers & work/study help
S.	Cut Kids staff	\$	8,000	Cut staff led programs
T.	Cut Ref. Subs	\$	4,000	Cut computer classes
U.	Cut Adult Libn hrs	\$	3,250	Use Br. Libns at Jones
		\$	48,658	

IF New MBLC Materials Requirement:

	Town funds * .13	\$	163,375	\$	156,890
	mats per capita	\$	4.67	\$	4.48
	Statewide avg per cap	\$	6.12		
	-/+ from level serv	\$	(83,625)	\$	(90,110)
			-34%		-36%
OPTIONS:					
	Close 4 hours (Fri pm)	\$	14,800	instead of Mon or Sun pm	

DEBT SERVICE

7701: DEBT & INTEREST

	FY 07 Actual	FY 08 Budget	FY 08 Actual	FY 09 Budget	FY 10 Manager	Change FY 09 - 10	Percent Change
Principal	1,263,312	1,068,963	1,068,963	965,714	932,341	(33,373)	-3.5%
Interest	433,163	365,882	364,102	424,133	629,851	205,718	48.5%
Deferred Payments	56,514	56,514	56,514	56,514	56,514	0	0.0%
TOTAL APPROPRIATION	1,752,989	1,491,359	1,489,579	1,446,361	1,618,706	172,345	11.9%
SOURCES OF FUNDS							
Taxation	1,707,990	1,447,693	1,445,913	1,359,779	1,534,932	175,153	12.9%
CPAC Funds	44,999	43,666	43,666	86,582	83,774	(2,808)	-3.2%

MAJOR COMPONENTS:

	Principal	Interest	Deferred Payments	TOTAL
Town Hall Refunding	170,000	42,900		212,900 ✓
Jones Library	51,000	4,549		55,549 ✓
* Regional High School Debt	245,076	155,761		400,837 ✓
Regional High School Roof	91,265	23,500		114,765 ✓
Crocker Farm Renovation	200,000	66,000 72,000		266,000 272,000 ✓
Sidewalks	65,000	12,188		77,188 ✓
Wildwood Roof	60,000	6,885		66,885 ✓
Plum Brook Athletic Fields Temporary Debt	50,000	14,140	12,120	64,140 ✓
Multi purpose (Town Hall, Bangs estimated)		283,928		↓ 283,928 207,109
Interest on Temporary Debt		20,000		20,000 ✓
Deferred Teachers Payroll			56,514	56,514 ✓
TOTAL	\$932,341	\$629,851	\$56,514	\$1,618,706
				1,545,867

* Debt funded through Proposition 2 ½ overrides

SIGNIFICANT BUDGET CHANGES:

This is a preliminary estimate. The debt service budget recommended to Town Meeting may change after the JCPC updates the five year capital plan and the timing and amount of short-term borrowing for previously authorized projects is finalized.

SERVICE LEVELS:

	FY 04 Actual	FY 05 Actual	FY 06 Actual	FY 07 Actual	FY 08 Actual
Number of Issues					
School Debt	5	5	5	7	3
Town Debt	8	9	11	9	5
Library Debt	1	1	1	1	1

JOINT CAPITAL PLANNING COMMITTEE

30-Apr-2009
updated 28-May-2009RECOMMENDED REDUCTIONS TO FY 10 CAPITAL PLAN (in priority order)
IF FUNDING REDUCED BELOW 7.25% OF TAX LEVY

Line #	Item	Category	FY 10	Cumulative Reductions	Funding Tiers	% of Tax Levy
JCPC Reductions 4/30/09:						
377	Town-Wide GIS Mapping/Flood Area Analysis	Facilities	(100,000)	(100,000)	(117,558)	7.00%
50	Aerial Ladder Refurbish	Equipment	(95,000)	(195,000)		
344	Marks Meadow Exterior Doors	Buildings	(20,000)	(215,000)	(206,734)	6.75%
	Subtotal - JCPC Reductions 4/30/09		(215,000)			
Finance Committee Additional Reductions 5/28/09:						
365	Downtown Improvements Matching Fund	Facilities	(10,000)	(225,000)		
85	DPW - One Ton Dump 4x4 Plow w/ Garbage Body	Equipment	(60,000)	(285,000)		
112	Pickup Truck (Ballfield Maintenance)	Equipment	(25,000)	(310,000)	(295,909)	6.50%
454	Leak Repairs - War Memorial Pool	Facilities	(10,000)	(320,000)		
378	Public Arts Maintenance	Facilities	(5,000)	(325,000)		
369	Downtown Wayfinding Sign System (partial)	Facilities	(10,000)	(335,000)		
145	Jones - Public Disability Access Computer	Equipment	(10,000)	(345,000)		
280	Hitchcock Center - Perry Room Roof	Buildings	(5,000)	(350,000)		
	Subtotal - FC Additional Reductions 5/28/09:		(135,000)			
Additional Reductions (if necessary):						
38	Fire Prevention Officer Vehicle	Equipment	(32,000)	(382,000)		
155	Schools - Maintenance Fleet Vehicles	Equipment	(30,000)	(412,000)		
	Subtotal - Additional Reductions (if necessary)		(62,000)			
	TOTAL REDUCTIONS		(412,000)			
169	TOTAL EQUIPMENT		1,023,200			
170	Less Chapter 90		170,000			
171	Less Grants					
172	Less Ambulance					
173	Less Borrowing					
174	Less Other Available Funds					
175	TOTAL TAX SUPPORTED EQUIPMENT (JCPC)		853,200			
	Less: FC Additional Reductions 5/28/09		95,000			
	TOTAL TAX SUPPORTED EQUIPMENT (FC)		758,200			
357	TOTAL BUILDINGS		417,200			
358	Less CPA		72,200			
359	Less Grants					
360	Less Ambulance					
361	Less Borrowing					
362	Less Other Available Funds					
363	Total Tax Supported Buildings (JCPC)		345,000			
	Less: FC Additional Reductions 5/28/09		5,000			
	TOTAL TAX SUPPORTED BUILDINGS (FC)		340,000			
	BLDGS.					
527	TOTAL FACILITIES		1,187,100			
528	Less Chapter 90		500,000			
529	Less CPA		489,100			
530	Less Grants					
531	Less Borrowing					
532	Less Other Available Funds					
533	Total Tax Supported Facilities (JCPC)		198,000			
	Less: FC Additional Reductions 5/28/09		35,000			
	TOTAL TAX SUPPORTED FACILITIES (FC)		163,000			
	FACILITIES					

1. The first part of the paper is a review of the literature on the effects of the 1997 Asian financial crisis on the economies of the Asian countries.

2. The second part of the paper is a review of the literature on the effects of the 1997 Asian financial crisis on the economies of the Asian countries.

3. The third part of the paper is a review of the literature on the effects of the 1997 Asian financial crisis on the economies of the Asian countries.

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